Basic Navigation and Inquiry

Student Guide

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Introduction

Chapter 1

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Course Objectives

At the end of this course, you should be able to:

- Sign on and off of Oracle Applications
- Recognize toolbars and menus for proper use
- Set personal user profile options
- Access online Help within the Oracle Applications environment
- Enter and maintain data using Oracle forms
- Query data entered using Oracle Query and Find modes
- Run and monitor reports and programs
- Customize the presentation of data in Oracle Applications forms

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Using Your Student Guide

All Department of Transportation training materials follow a consistent format. The use of these abbreviations for repetitive areas within a Window being demonstrated or for use in working the labs is also consistent.

(B) for Button

(M) for Menu

(N) for Navigate

(I) for Icon

A box will appear prior to each Window you will be using. The box will provide the individual navigational instructions. The information in the box follows this format:

Oracle Applications
N → Requests → View → Specific Request
M → View → Requests
Find

Line 1:	The Name of the Oracle application to be used.
Line 2:	navigation path using arrows to display the levels of the path to use.
Line 3:	Other pertinent navigations, such as an icon to be selected.
Line 4 or the last line in the box:	The name of the Window that will appear for this navigation instruction.

Prior to using the navigation instructions contained within each box, the responsibility must be chosen to provide the options needed in the navigational instructions.

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Introduction

This course discusses the basic features of navigating within Oracle Applications, Release 11i. The aim is to enable you to navigate within any of the Oracle Applications forms, regardless of the application module. You will learn to enter data, retrieve information in the form of a query, maintain data, and access online Help. Additionally, concurrent processing and standard report submission topics will be discussed.

This course is intended for all end users of Oracle Applications as a prerequisite to any applications course.

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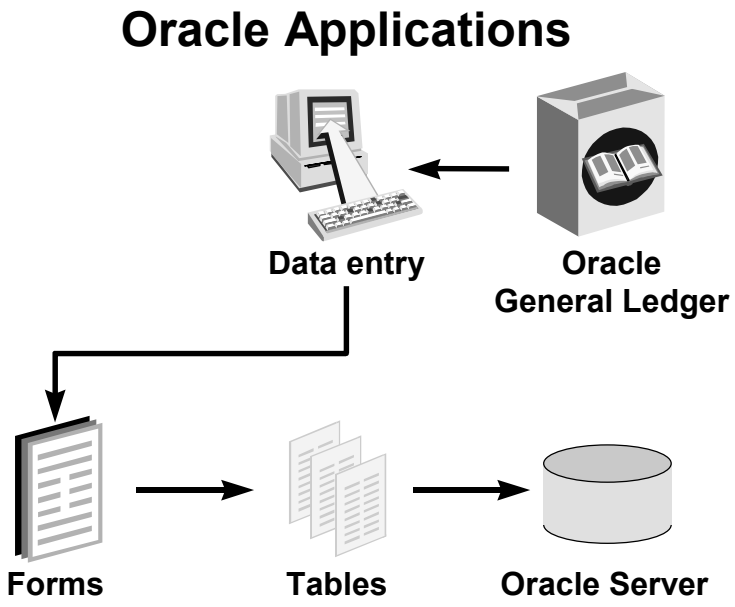

Sample Flow of Oracle Applications Data

Oracle Applications is a tightly integrated family of application products that share a common look and feel. Using the menus and windows of Oracle Applications, you have access to all the functions that you need to manage your business information.

Oracle Applications software is highly responsive to users by providing full point-and-click capability. You use your mouse or keyboard to operate graphical controls such as pull-down menus, buttons, pop-up lists, check boxes, or alternative regions. An Oracle Applications form is a user's interface to business data stored in the database. You may have called it a "screen" in other applications. You navigate between and within forms to enter and access information from the database.

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Signing On and Off Oracle Applications

Chapter 2

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Signing On and Off Oracle Applications

Section Objectives

At the end of this section, you should be able to:

- Log on to Oracle Applications
- Choose a responsibility
- Use the Oracle Applications Navigator
- Explain the function of the buttons that appear on the Navigator window and other forms
- Discuss the various components of an Oracle Applications form
- Change your password
- Log off of Oracle Applications

Navigating in Oracle Applications

To use Oracle Applications productively, you need to understand the various components of a form, the menu paths, and keystrokes necessary to access and navigate within the system to perform your various job tasks.

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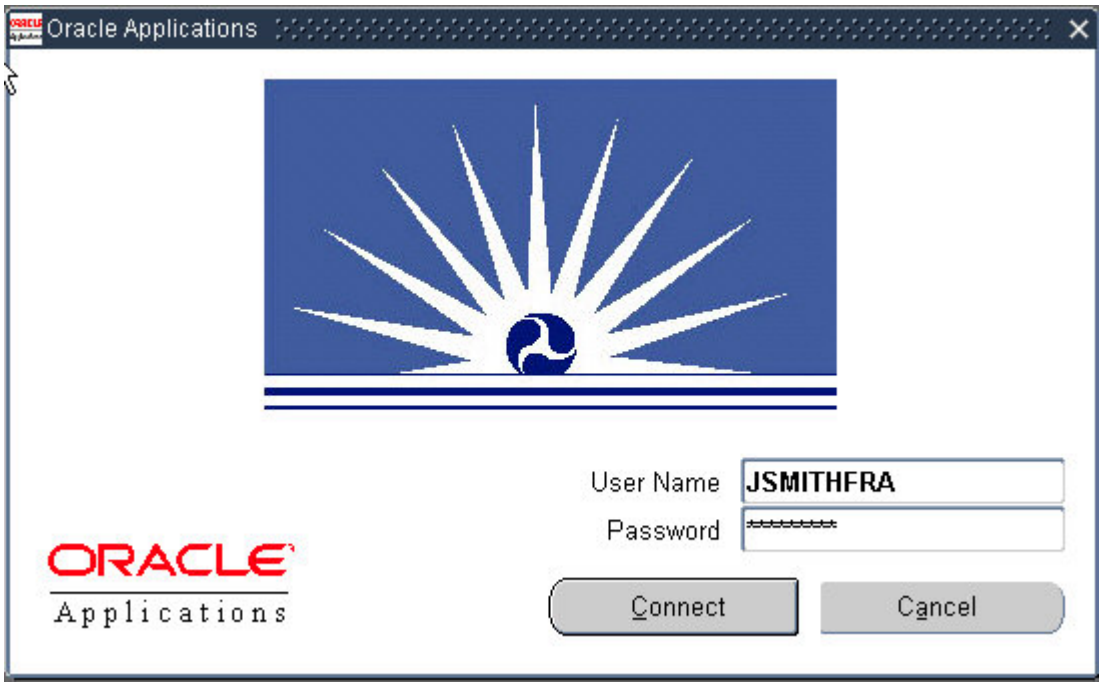
Starting Oracle Applications

Oracle Applications

Use your internet browser to access the logon for Oracle applications at the *DELPHI Home Page [http://delphi.jccbi.gov]*

Microsoft Internet Explorer or Netscape
N→Microsoft Internet Explorer or Netscape→DELPHI Home Page
I→DELPHI Access
B → Connect
Oracle Applications



Logging On to Oracle Applications

1. Enter your username and password.

   Refer to *Signing on DELPHI Requirements [REF7116Z]*

2. Select (B) Connect when you are finished entering your username and password.

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Note: If you select (B) Cancel, you will close this window and return to the Oracle Applications program group icon.

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Signing on DELPHI Requirements

Distribution

Basic Navigation

System References

Signing on DELPHI [PRO0214A]

Starting Oracle Applications [NAV1300Z]

Ownership

The Oracle System Administrator is responsible for ensuring that this document is necessary and that it supports Department of Transportation policy.

Username Requirements

A username is a unique identifier for each person who will use the system.

Password Requirements

The Password field does not display the characters that are typed into it. This is to protect the confidentiality of the password. The password should be kept confidential to prevent unauthorized users from gaining access to the system.

User accounts are locked after three invalid login attempts

- After three invalid password attempts the user account is end-dated.
- The account cannot be reused until a security officer is contacted and a request is made to re-enable the account.
- Note that the error message received when the password is incorrect is the same as when the username is incorrect. The following message will be received:

  Your login is invalid. Please login again.

New passwords

- If a new password is entered which does not follow these requirements the following message will appear:

  Your attempt to change the password failed. Please try again.

- Passwords may not be reused for 360 days.

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- If it is necessary to change the password before it expires, do so through the following forms:

  From the Toolbar
  Edit>Preferences>Change Password

  From your Personal Home Page
  Preferences>General Preferences

Passwords must be complex

Passwords must be complex according to the following rules:

- The password must contain both two or more alphabet letters and two or more numbers for a total of 8 characters.
- The password may not contain the username.
- The password may not contain repeating characters or numbers.

Examples of invalid username/password combinations

The following table gives a few examples of invalid username/password combinations.

Username	Password	Reason
Jsmith	administrator	Does not contain a number
Jsmith	admin4jsmith	Contains username
Jsmith	hello23	Contains repeating letters (ll)
Jsmith	helper22	Contains repeating numbers (22)

Examples of valid username/password combinations

The following are examples of valid username/password combinations.

- **Jsmith welcom23**
- **Jsmith 1234wxyz**

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Selecting a Responsibility

Once you have used the sign-on form to begin the logon process, you must tell the system what type of access you will be using. A *responsibility* is a predefined set of data, menus, and forms that define your particular level of authority while using the system. For example, you would want the Accounts Payable group of your organization to access the invoice forms of the system, but you would not want them to be able to access financial report information. Another example is that the controller of a department would want to have access to all the data that his or her employees can use, so the controller would want access to both accounts payable and financial report information.

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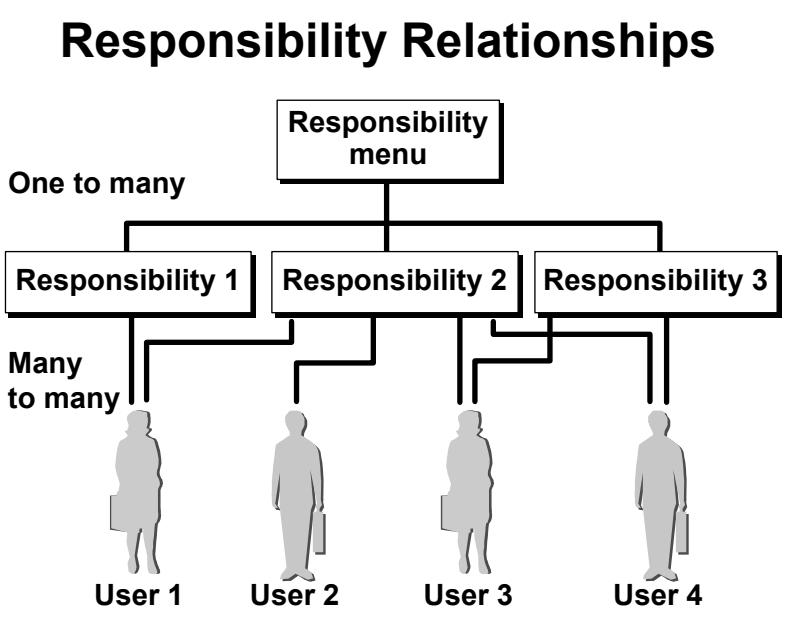

Properties

The following is a list of the types of responsibilities and their particular properties that can be defined in Oracle Applications by your system administrator:

- A specific application (or applications), such as Oracle General Ledger.
- A set of books, such as office of the Secretary of Transportation (OST).
- A restricted list of windows to which you can navigate. For example, a responsibility may allow certain Oracle Financials users to enter invoices, but not to enter suppliers (vendors) or customers.
- A restricted list of functions you can perform. For example, two responsibilities may have access to the same window, but the window of one responsibility may have additional functional buttons.
- Reports in a specific application. Your system administrator can assign groups of reports to one or more responsibilities, so the responsibility you choose determines the reports that you can submit.

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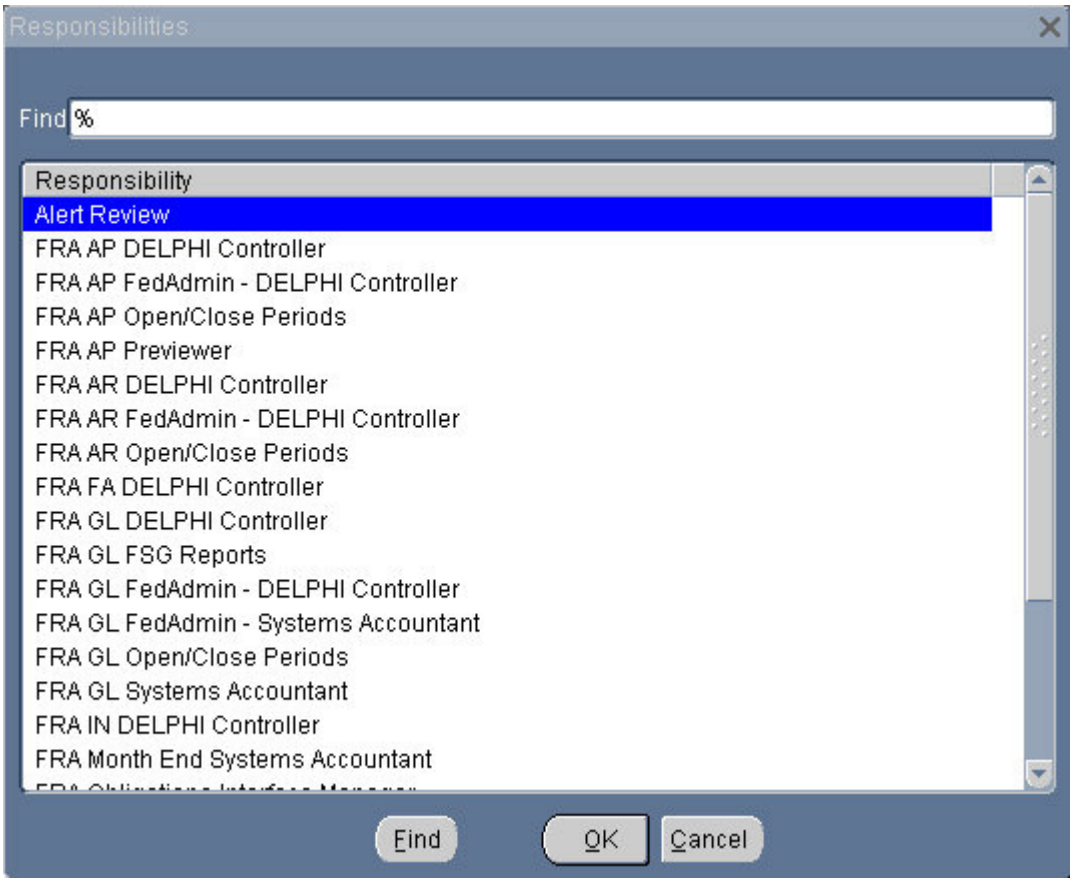
Choosing a Responsibility

Responsibilities

Microsoft Internet Explorer or Netscape
N→Microsoft Internet Explorer or Netscape→DELPHI Home Page
I→DELPHI Access
B→Connect
Responsibilities



Responsibility Assignments

Each user has at least one responsibility and several users can share the same responsibility. Your system administrator can assign you any of the standard responsibilities provided with Oracle Applications, or create new custom responsibilities for you. If your system administrator assigns you just one responsibility, you will not see the Responsibility window. You will go right into the Navigator window for your assigned responsibility.

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Use one of the following methods to select a responsibility:

- Use the up and down arrows to select a value and Enter.
- Use your mouse to select a value and Enter.
- Double-click a highlighted value to choose it.

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Navigator Window

The Navigator window displays the name of the responsibility you select.

Use this window to navigate to a form so you can perform a specific business flow. The forms that you can navigate to are displayed in a navigation list on the left side of the Navigator window.

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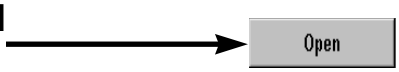
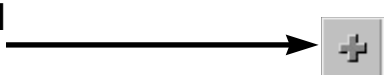
Expanding or Collapsing the Navigation List

Choose one of the following methods to expand an item to its next sublevel form:

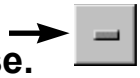
- **Double-click the item.**
- **Select the item and choose Open.**



- **Select the item and choose Expand.**



To collapse an expanded item, select the item and choose Collapse.



Navigator Buttons

Each user can access the Oracle Applications forms in several ways so that they can use the system quickly, according to their own computer style.

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Expanding or Collapsing the Several Items

To expand or collapse several items at once, choose one of the following buttons:

- **Expand All Children expands all the sublevels of the currently selected item.**
- **Expand All expands all the sublevels of all expandable items in the navigation list.**
- **Collapse All collapses all currently expanded items in the navigation list.**

Navigator Buttons

Select any of these buttons to expand or collapse several items listed on the Navigator Menu.

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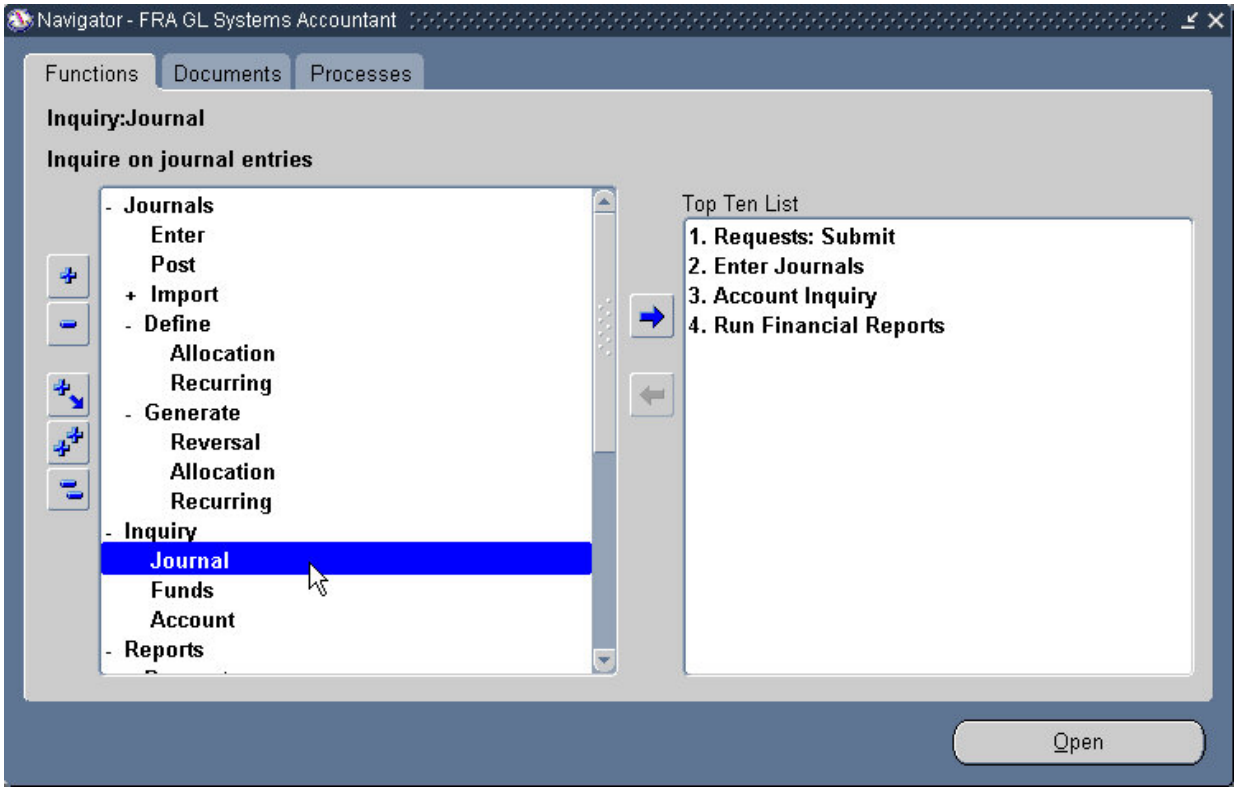
Creating a Navigation Top Ten List

Navigator

Internet Browser
N → Connect to Oracle Applications → Application Job Title
Navigator



Navigator: Functions

The Navigator Window

If there are forms that you use frequently, you can add them to a navigation top ten list located on the right side of the Navigator window. The top ten list displays your forms numerically so you can choose them instantly without having to search for them in the navigation list. You can add a maximum of ten forms to the top ten list and you can create a different top ten list for each responsibility for which you have access. A top ten list is unique for the responsibility and user sign-on combination that you use.

How to Create a Navigation Top Ten List

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1. Select a frequently used form from the navigation list by highlighting it in the Navigator window.

2. Select (B) Arrow (→).

3. Select (B) Arrow (←).

4. Enter the top ten list number that precedes the form you want to open.

Note: Sometimes the form that you add changes names when it appears in the top ten listing. An example is that Suppliers becomes Vendors, or Orders, Returns becomes Order Workbench.

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Changing Your Password

If it is necessary to change your password you may do so at any given time.

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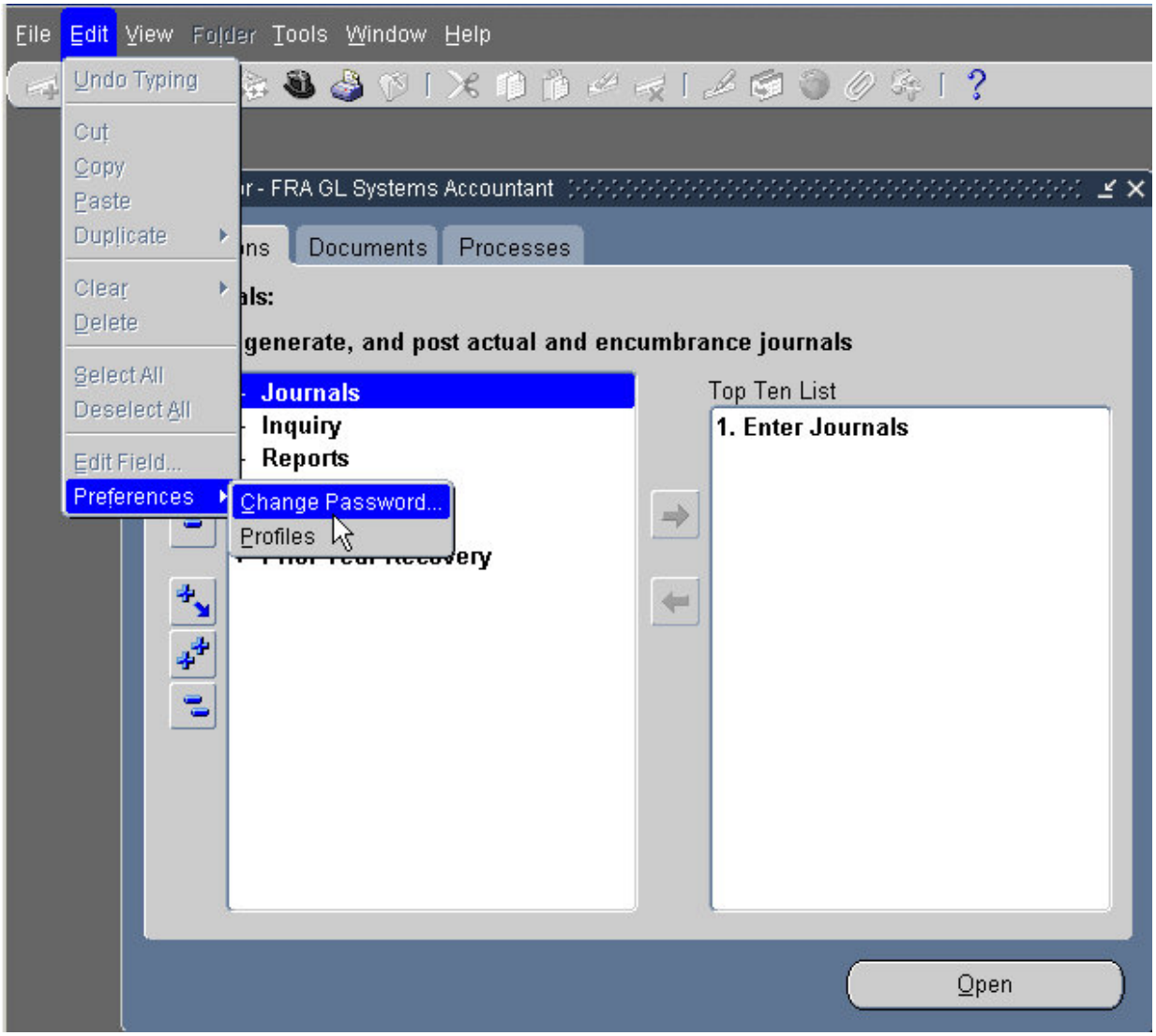
Changing Your Password

Responsibilities

Oracle Applications
M → Edit → Preferences → Change Password
Password Update

See your Security Officer for current guidelines on password rules.



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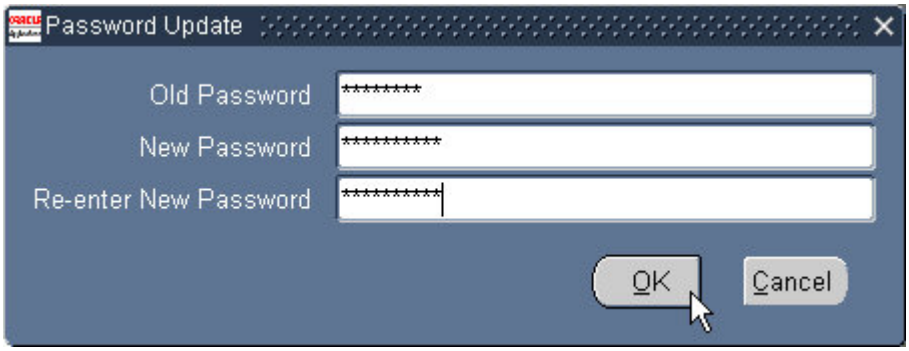
Following your menu selection, the Password Update window will appear.



1. Enter the password you used to signon to this session in the Old Password field.
2. Enter you new password in the New Password field following the most recent password security guidelines for creating passwords.
3. Re-enter your new password in the Re-enter New Password field.
4. Select (B) OK.

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Logging Off of Oracle Applications

Upon completion of your activity, you may logoff the Oracle application.

> **NOTE:** Do not use 'X' 'Close' to close your Oracle application as your data will not be saved.

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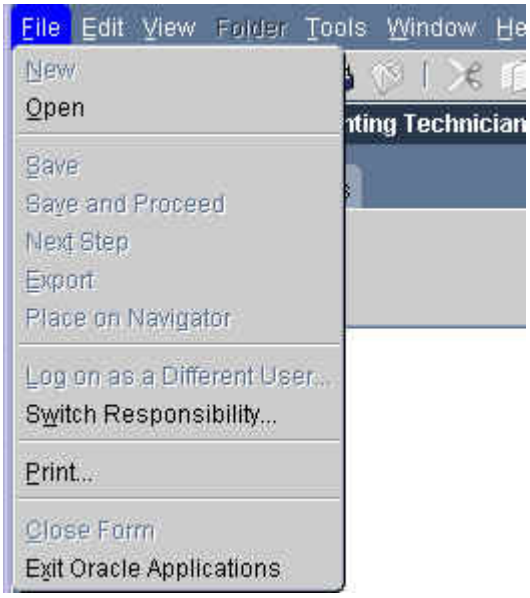
Logging Off of Oracle Applications

Navigator

Oracle Applications
M → File → Exit Oracle Applications
Navigator



Exiting Oracle Applications

From the menu bar, select (M) File → Exit Oracle Applications to log off the system. It is important to exit the system in this manner, rather than any other, as this is the only way to ensure that your username is cleared from system access.

NOTE: Do not use 'X' 'Close' to close your form or exit the Oracle application, as some of your data will not save. (Select cancel in the popup window shown below.)

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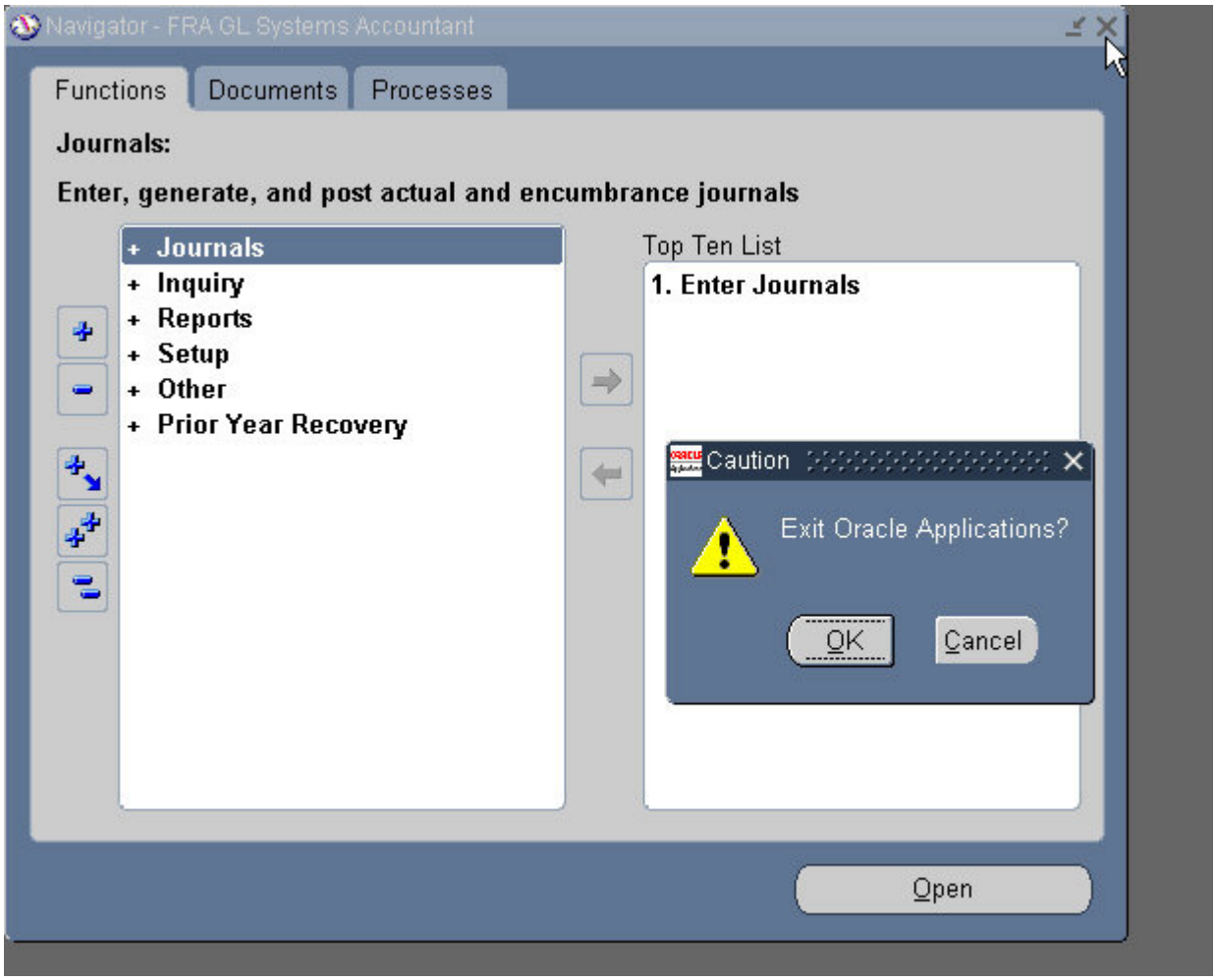

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Summary

- Logging on and off of Oracle Applications
- Selecting a responsibility
- Changing your password
- The functionality of the buttons that appear on the Navigator window and other forms
- Using the Toolbar window and the menu for Oracle Applications

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Lab 1: Signing On and Off Oracle Applications

As the Training Administrator for your company, log on and off of Oracle Applications with the username “TRNGXX” and the password “WELCOME.”

Take about five minutes to familiarize yourself with the Navigator window and experiment with the functionality of the buttons discussed earlier in this lesson.

Create a Navigator top ten list.

Log on to Oracle Applications as an FRA GL Systems Accountant.

Add Other Requests to the Navigator top ten list.

Add Standard Report Requests to the Navigator top ten list.

Note: Remember to exit Oracle Applications properly when you are finished so you will not permit unauthorized access to another user.

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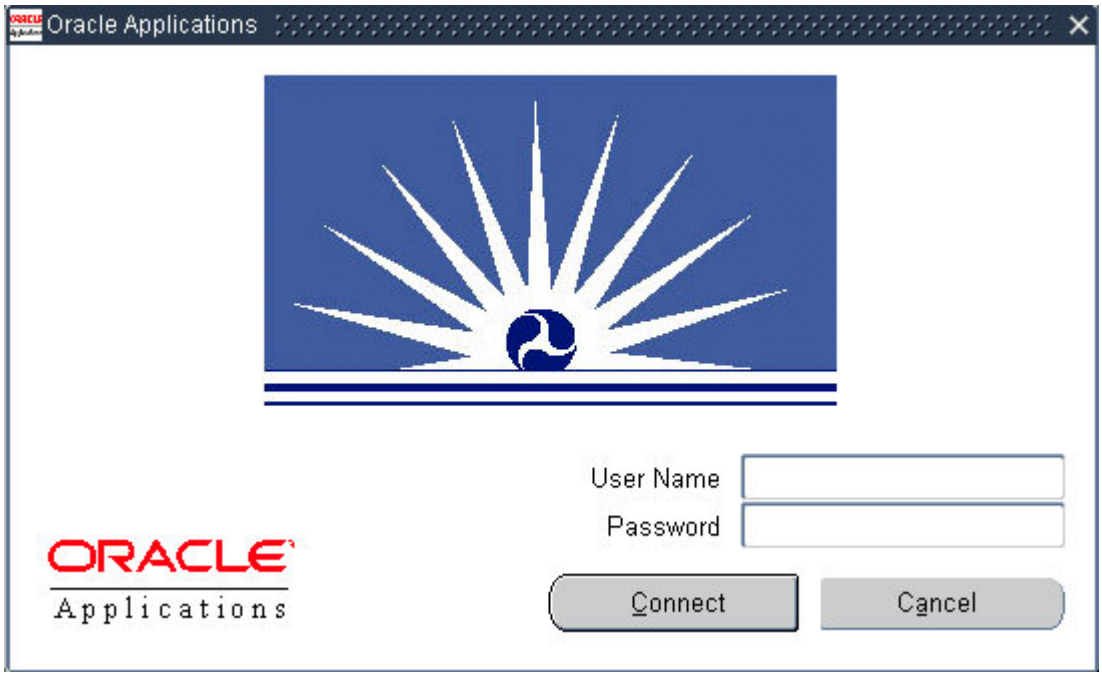
Lab 1 Solutions: Signing On and Off Oracle Applications



1. Double-click the Oracle Applications program group icon to begin the logon process.

2. Type the initial of your first name and then your last name in the Username field and welcome## in the Password field.

3. Verify that your window appears similar to the following:

4. When you are finished entering your username and password, select (B) Connect. Note: If you select (B) Cancel, you will close this window and return to the Oracle Applications program group icon.

5. Verify that your window appears similar to the one displayed below.

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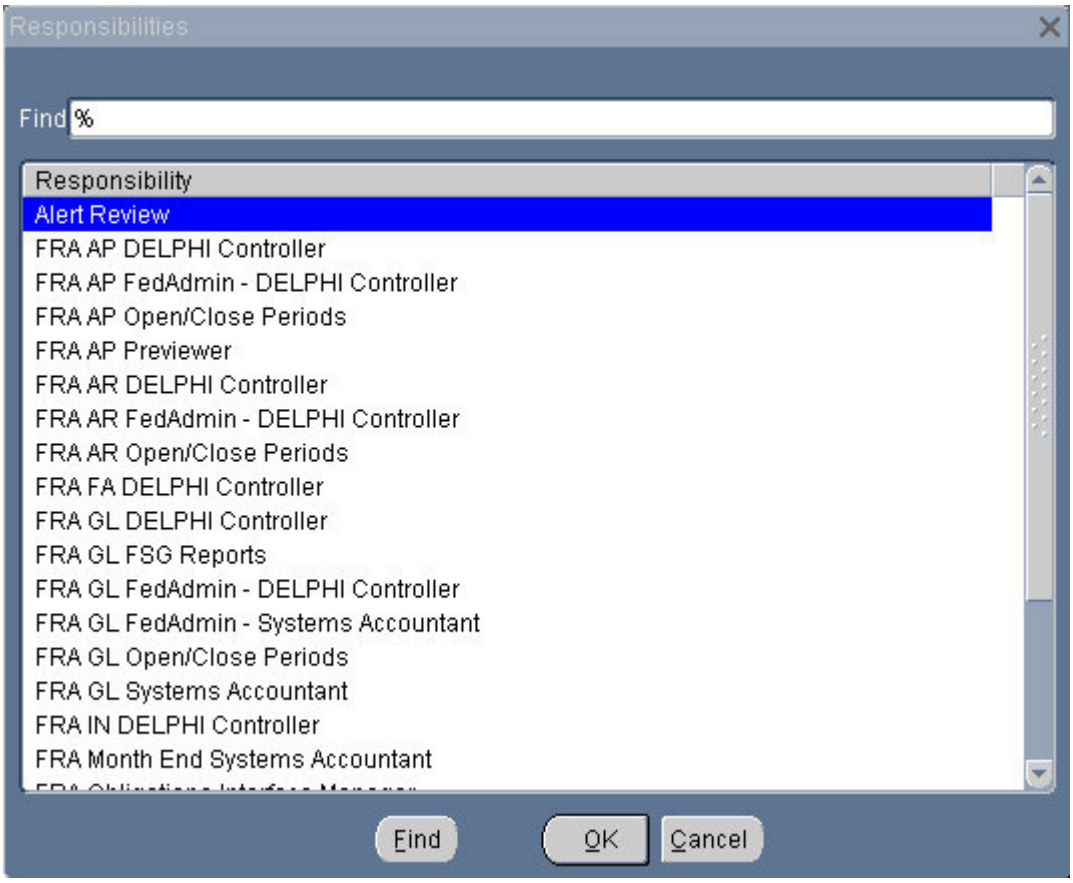

6. Select the desired responsibility from the list.

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7. After choosing the responsibility, you will be taken to the responsibility navigator window.

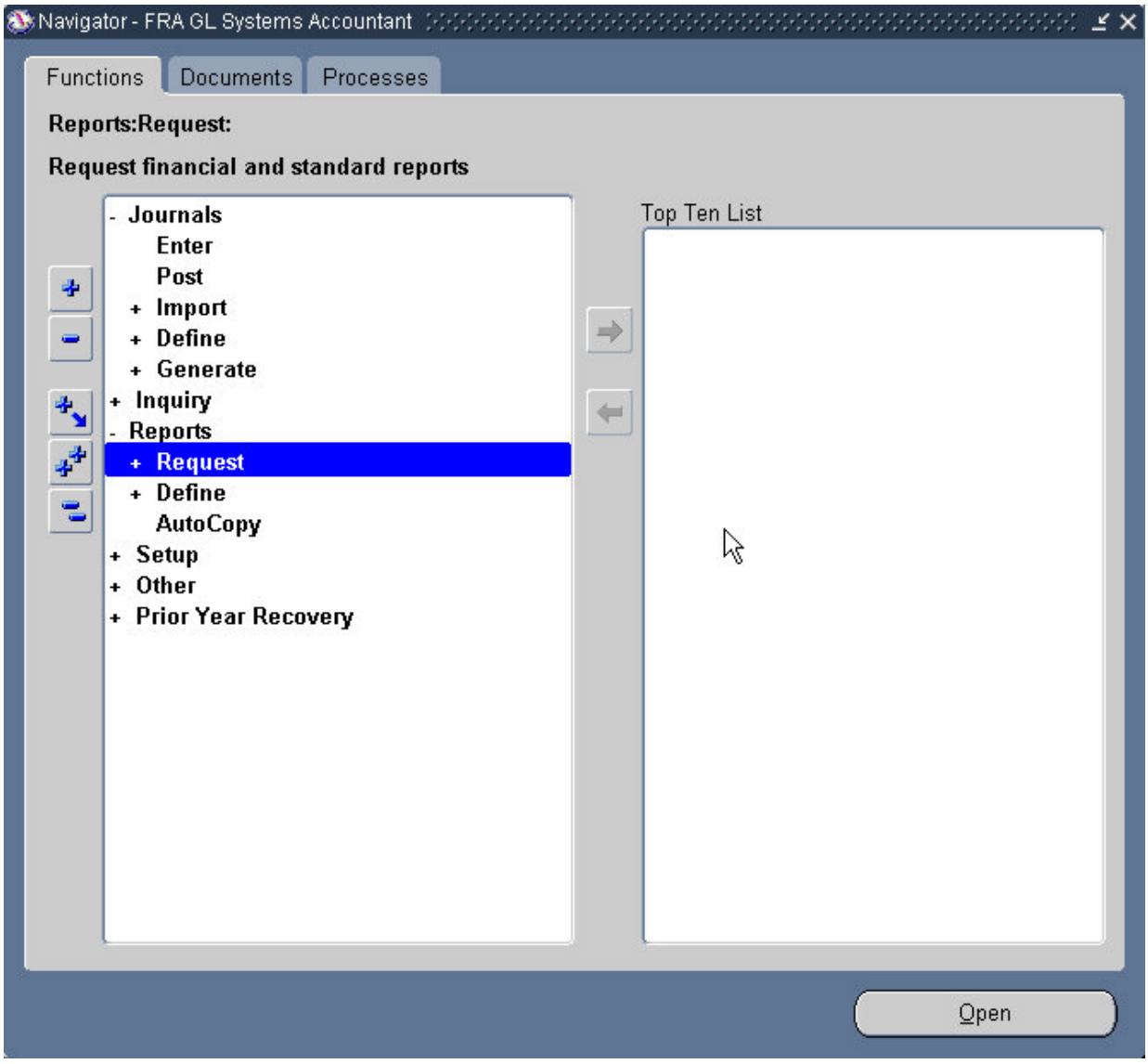
8. Take about five minutes to use the buttons on the Navigator window and familiarize yourself with their functionality.

9. Create a Navigator top ten list.

   Log on to Oracle Applications as an AR DELPHI Controller.

   Choose the AR DELPHI Controller responsibility from the list.

   Verify that your window appears similar to the one displayed below.



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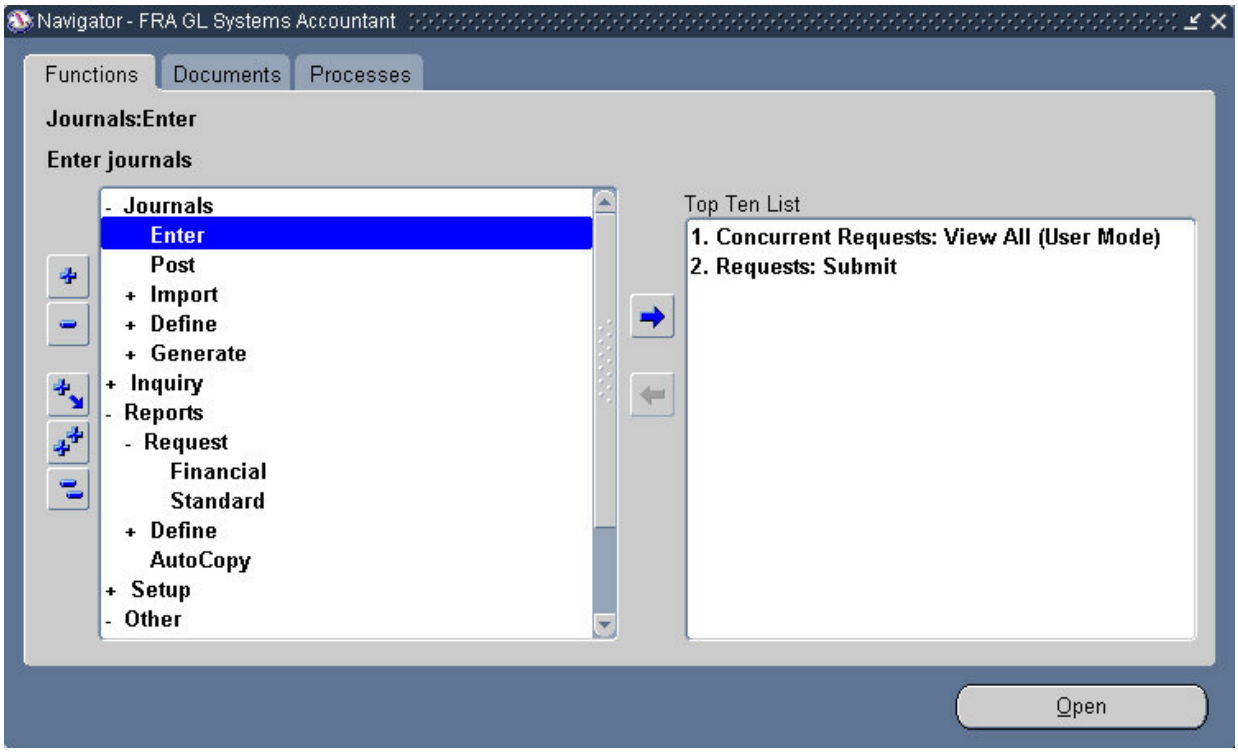
Add Other Requests to the Navigator top ten list.

Highlight Other → Requests and select the Right Arrow to add to the Navigator window.

Add Standard Report Requests to the Navigator top ten list.

Highlight Reports → Requests → Standard and select Add to add to the Navigator window.

Verify that your window appears similar to the one displayed below.



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Using Forms and Menus

Chapter 3

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Section Objectives

At the end of this section, you should be able to:

- Define basic form terminology
- Use the Applications toolbar and icons
- Discuss keyboard shortcuts
- Use various menu options available in Oracle Applications

Using Forms and Menus

This lesson discusses using forms and menus from the Navigator window. Form terminology, the Applications toolbar, and keyboard shortcuts will be explained to enable you to move quickly within Oracle Applications forms.

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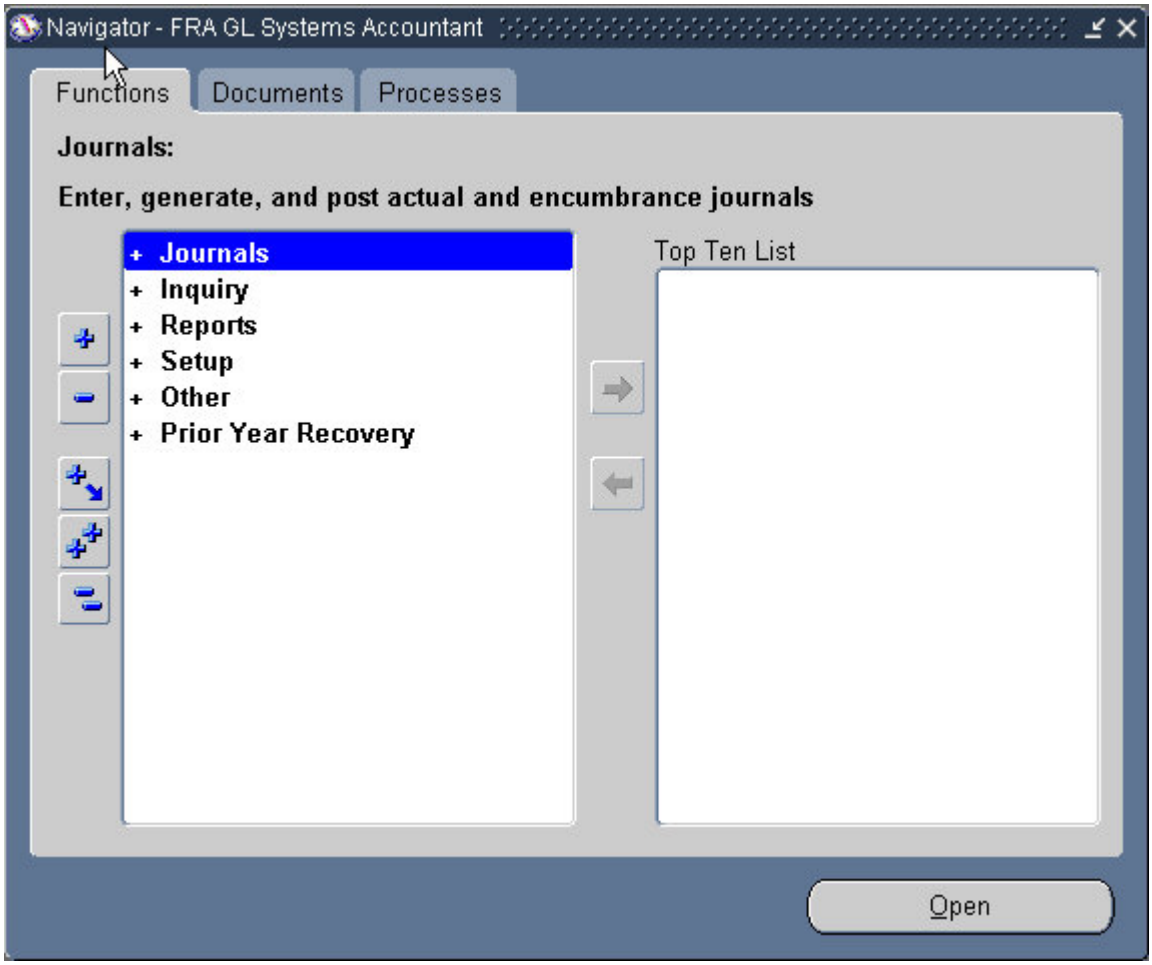
Opening a Form from the Navigator Window

Navigator

Internet Browser
N→Connect to Oracle Applications→Application Job Title
Navigator



Navigator: Functions

Each Oracle application has a Navigator window that is the starting point for access into the application and the basis for a user to decide what job task they would like to perform.

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The Navigator Window

Go to the Menu Bar and check the box next to Close Other Forms to specify whether multiple windows will be opened at the same time, as you proceed from form to form within the application. Similar to other Windows applications running simultaneously that have been collapsed, the other form will appear as a button on the Taskbar at the bottom of your screen, next to any other running, collapsed, applications. You can move between forms by selecting the button of the form you want to go to.

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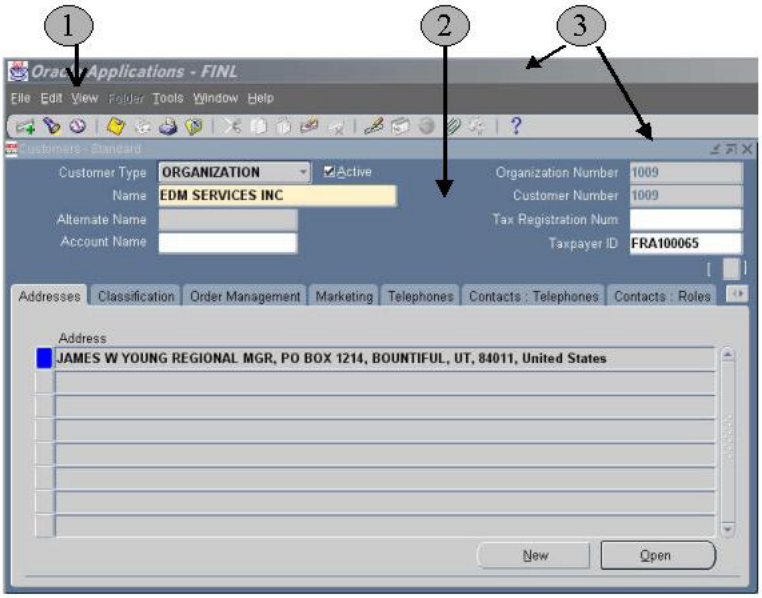

Form Terminology

Oracle Applications Release 11i works specifically in a Network Computer Architecture (NCA), or Web-enabled environment. It is important to understand the terminology of the components within an Oracle Applications form. The following table defines 13 common terms used in Oracle Applications forms.

Label Number	Term	Definition
1	Menu bar	Use pull-down menus from this menu bar to navigate within a form
2	Window	An area where the user interacts with an application (Many windows can be open at one time and you can access these “overlapping” windows to perform data entry or data search activities)
3	Window title	Text in the title bar that indicates the name of the window, and usually, context information pertinent to the information in that window

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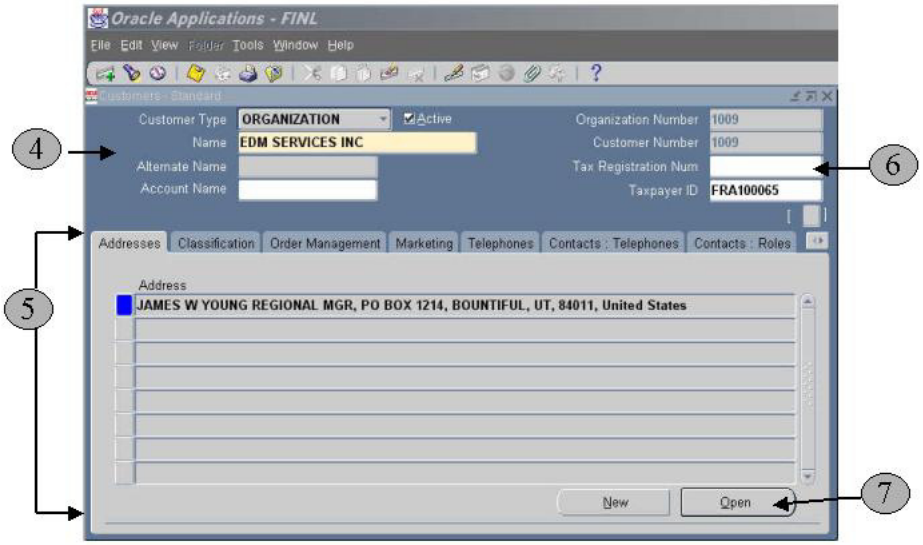

Form Terminology

Label Number	Term	Definition
4	Region	A logical grouping of fields set apart from other fields by a box outline
5	Alternative region	A collection of regions that occupy the same space in a window where only one region can be displayed at a time. You identify an alternative region by a poplist icon that displays the region title, which sits on top of a horizontal line that spans the region.
6	Field	An area in a window that displays data or enables you to enter data
7	Button	A graphic element that initiates a predefined action when you click it

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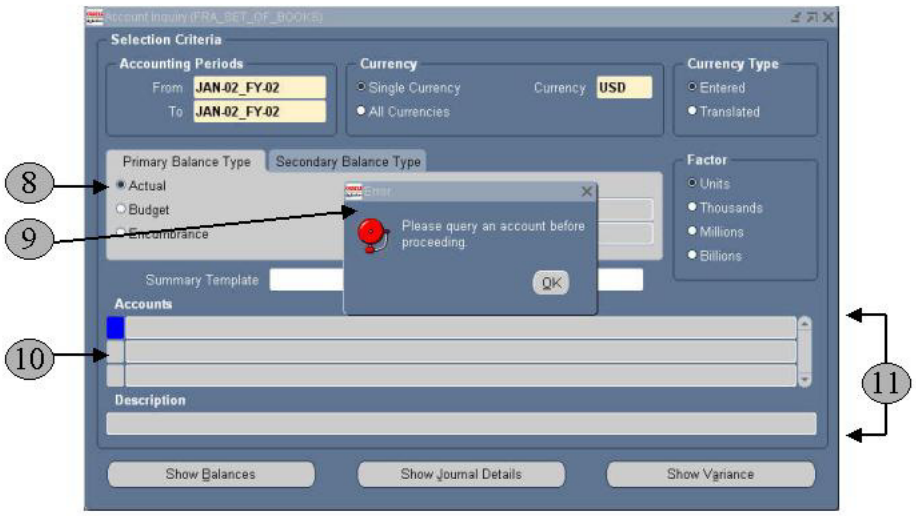

Form Terminology

Label Number	Term	Definition
8	Option button	A button that indicates an individual selection is available within an option group
9	Dialog box	A window that requires you to act on its content before continuing
10	Scrolling region	A region, containing a scroll bar, in which to view other fields
11	Block	An area of information relative to a specific business function or entity

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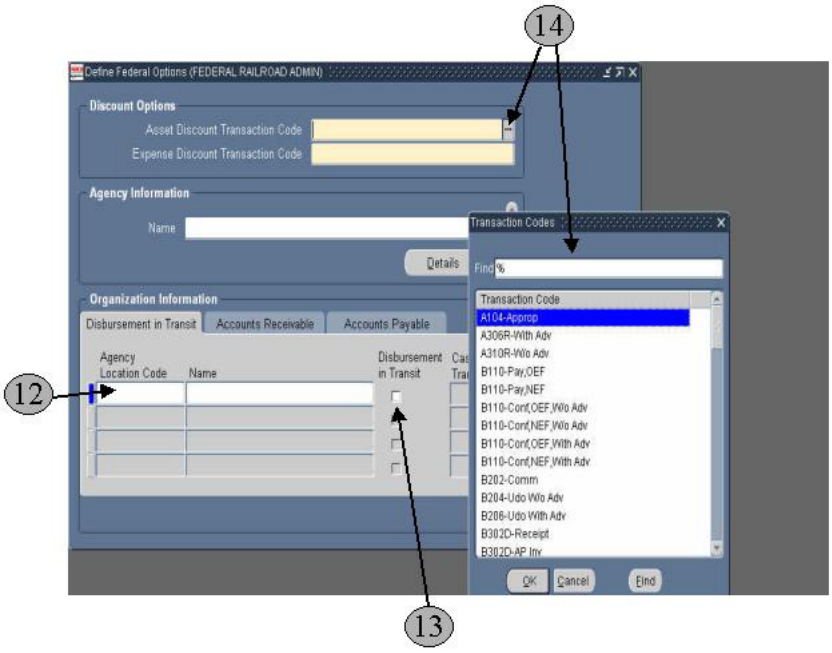

Form Terminology

Label Number	Term	Definition
12	Record or Row	A set of one or more data items grouped for processing
13	Check box	A box in which you can toggle between an on/off or yes/no state for a particular value
14	Pop-up list or LOV	A list of values (LOV) for the current field, if available

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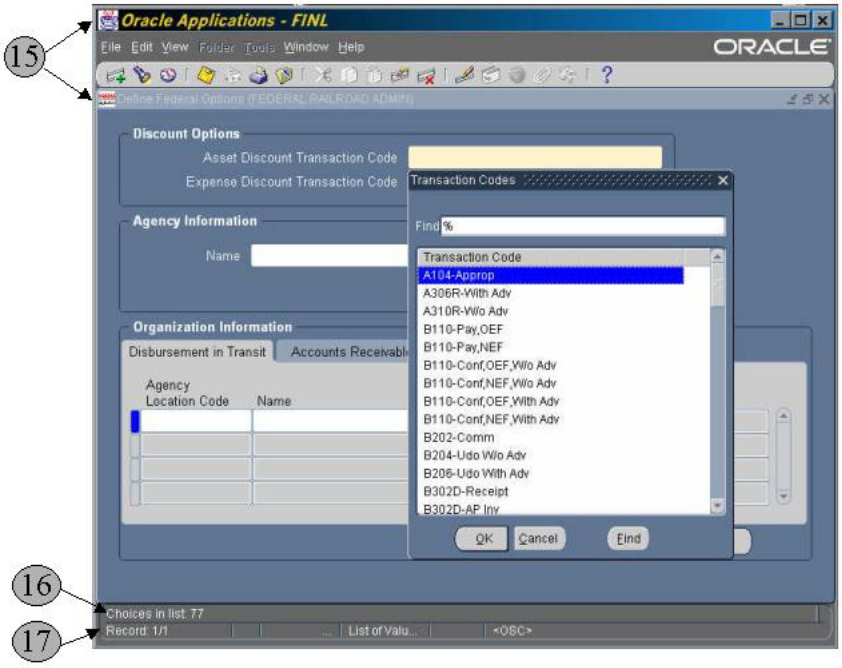
Form Terminology



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Using the Toolbar

The toolbar is a collection of iconic buttons that each perform a specific action when you choose it. Each toolbar button replicates a commonly-used menu item. Depending on the context of the current field or window, a toolbar button can be enabled or disabled. You can display a hint for an enabled toolbar button on the message line by holding your mouse steadily over the button. The toolbar generally appears below the main menu bar in the root window.

#	Term	Definition
15	Window Title	The window name
16	Message Line	Oracle Applications displays pertinent information for processing your form, including error messages
17	Status line	Oracle Applications displays status information

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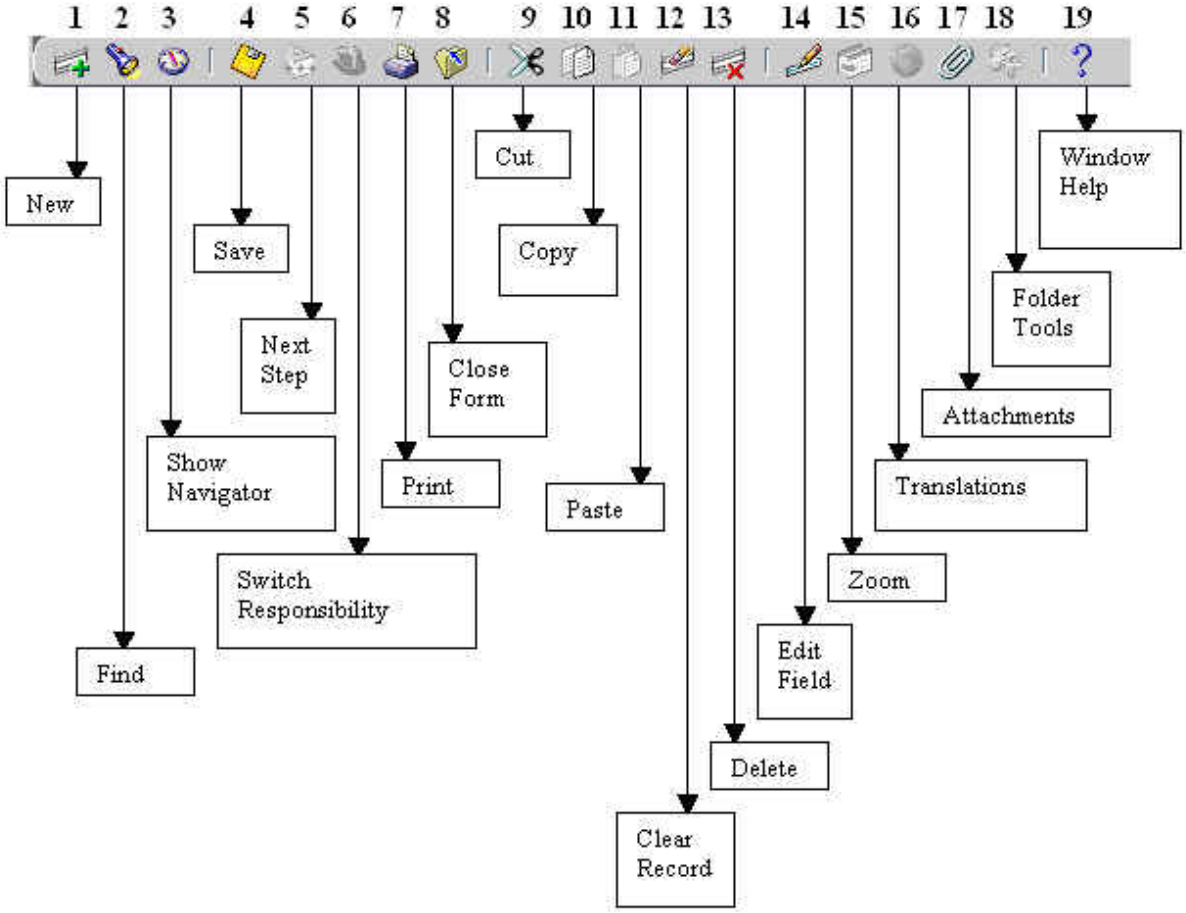
The Toolbar Icons

This is the toolbar shown with each icon's numeric assignment and corresponding term.



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The Toolbar Icons

The icons numerically from left to right are used as follows:

#	Term	Definition
1	**New**	The New icon creates a new record.
2	**Find**	An icon of a flashlight represents the Find function. The Find icon displays the Find window to search for field data.
3	**Show Navigator**	The Show Navigator icon returns you to the Navigator window.
4	**Save**	The save icon saves any pending changes
5	**Next Step**	The Next Step icon updates the Process workflow in the Navigator by advancing to the next step in the process.
6	**Switch Responsibility**	An icon with a hat represents the Switch Responsibility function. The Switch Responsibility icon will open the responsibilities window.
7	**Print**	The Print icon prints the current screen to your assigned default printer.
8	**Close Form**	The Close Form icon closes the current window.
9	**Cut**	The Cut icon cuts the current selection to the clipboard.
10	**Copy**	The Copy icon copies the current selection to the clipboard.
11	**Paste**	The Paste icon pastes the contents of the clipboard into the current field.
12	**Clear Record**	The Clear Record icon erases the current record from the window.
13	**Delete**	The Delete icon deletes the current record from the database.
14	**Edit Field**	The Edit Field icon displays the editor window for the current field.
15	**Zoom**	The Zoom icon invokes custom-defined zooms.
16	**Translations**	The Translations icon is not available for use in DELPHI.
17	**Attachments**	The Attachments icon displays the Attachments window.

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The Toolbar Icons

#	Term	Definition
18	**Folder Tools**	The folder Tools icon displays the folder tool palette.
19	**Window Help**	The Window Help tool displays help for the current window.

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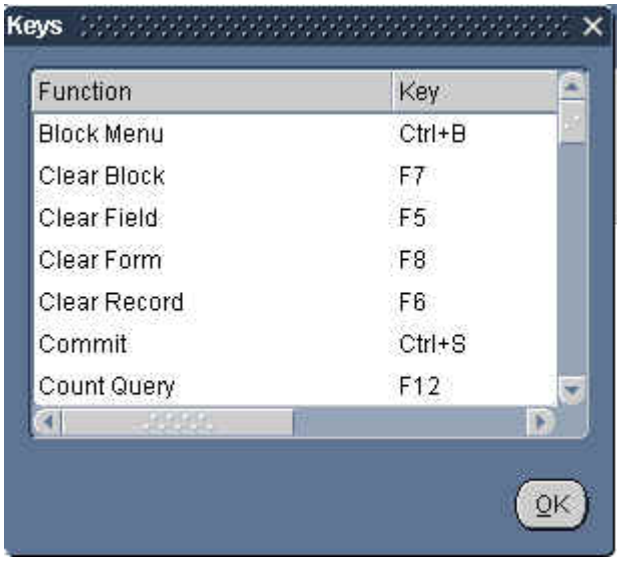
Keys

Oracle Applications M → Help → Keyboard Help Keys



Using Keyboard Shortcuts

You can perform some tasks with the keyboard that you can perform with the mouse. The default keyboard mapping for **some** shortcuts in Oracle Forms 4.5 are shown in the table below. Your system administrator can change the keyboard mapping defaults to fit your business needs.

Key	Function	Key	Function
[F6]	Clear record	[Ctrl] + [S]	Commit
[F11]	Enter query	[F12]	Count query
[Ctrl] + [F11]	Execute query	[F8]	Clear form
[Ctrl]+ [L]	List of values	[Shift] + [Ctrl] + [E]	Display error

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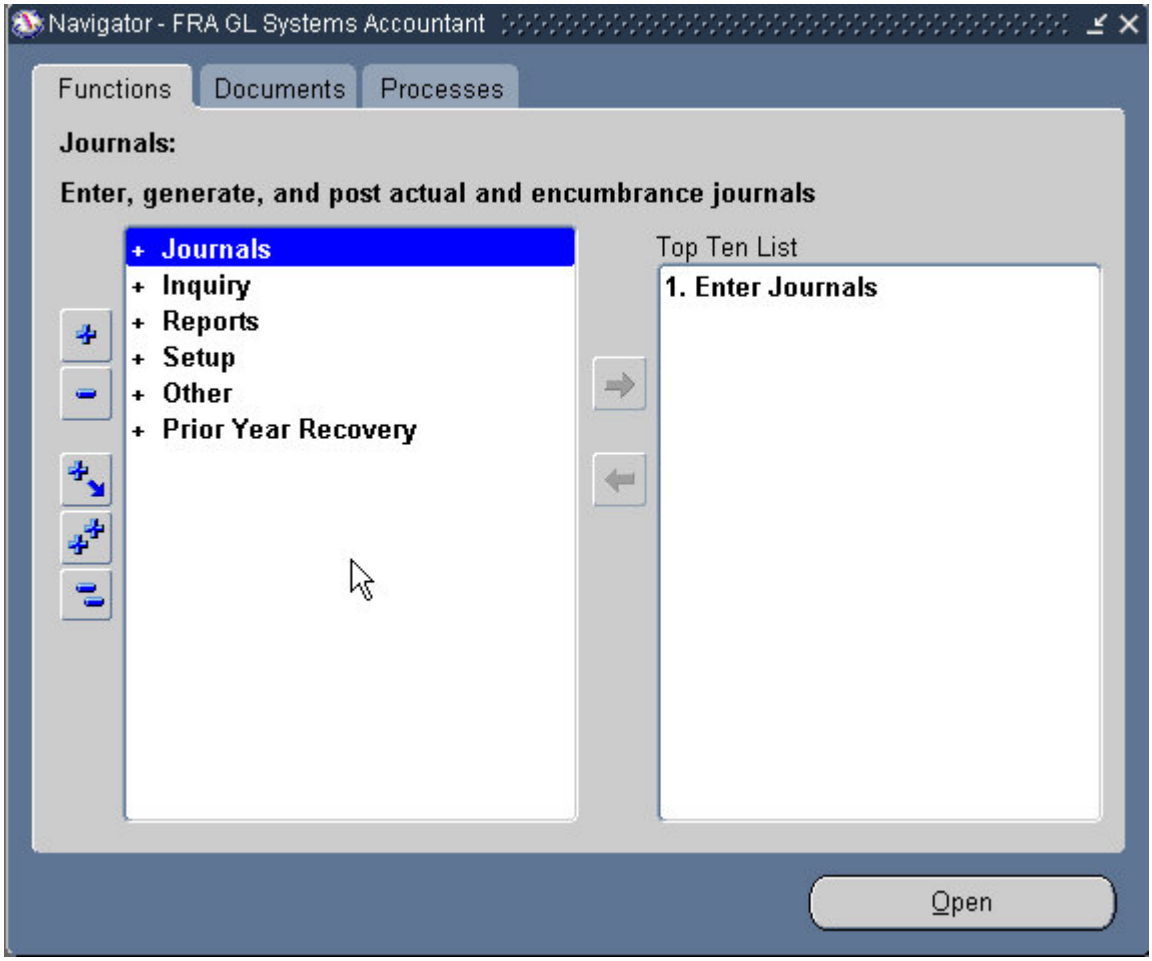
Using the Menu Bar



When you navigate to an Oracle Applications form you can use the pull-down menu to navigate within a form, to edit or retrieve data, or to perform various other actions.

The Oracle Applications main menu bar includes the following menus:

- File
- Edit
- View
- Folder
- Tools
- Window

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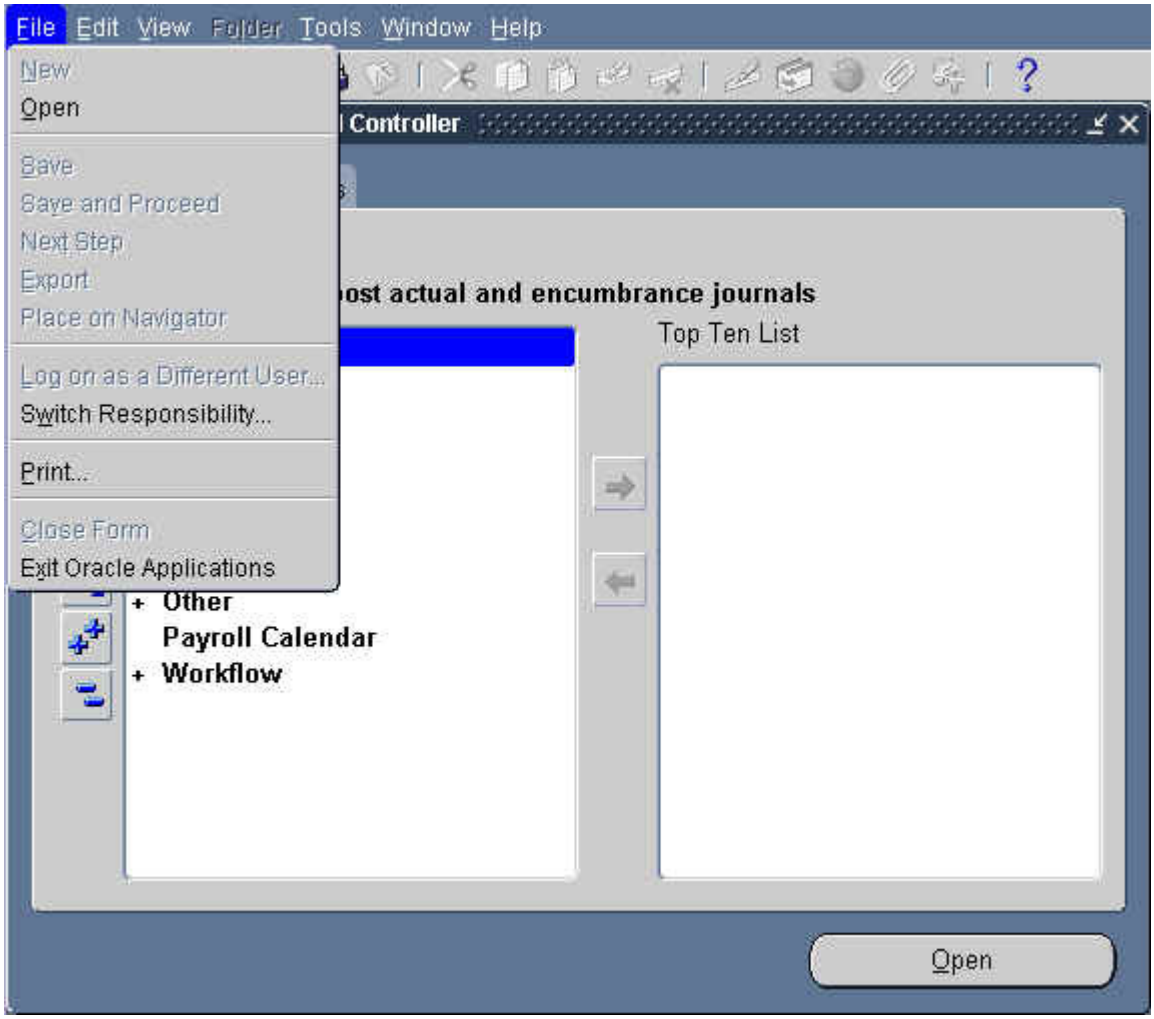
- Help

File Menu



The File menu lets you perform several actions in Oracle Applications:

FILE MENU	
Menu Item	**Comments**
New	Opens a new record in the active form.
Open	Opens the detail screen for the current selection.
Save	Saves any pending changes in the active form.
Save and Proceed	Saves any pending changes in the active form and advances to the next record.
Next Step	Updates the Process workflow in the Navigator by advancing to the next step in the process.
Export	Exports information in your folder form to a browser.
Place on Navigator	Creates an Icon in the Documents tab of the Navigator that can be used to recall the active form and its current record.
Log on as a Different User	Not Available.

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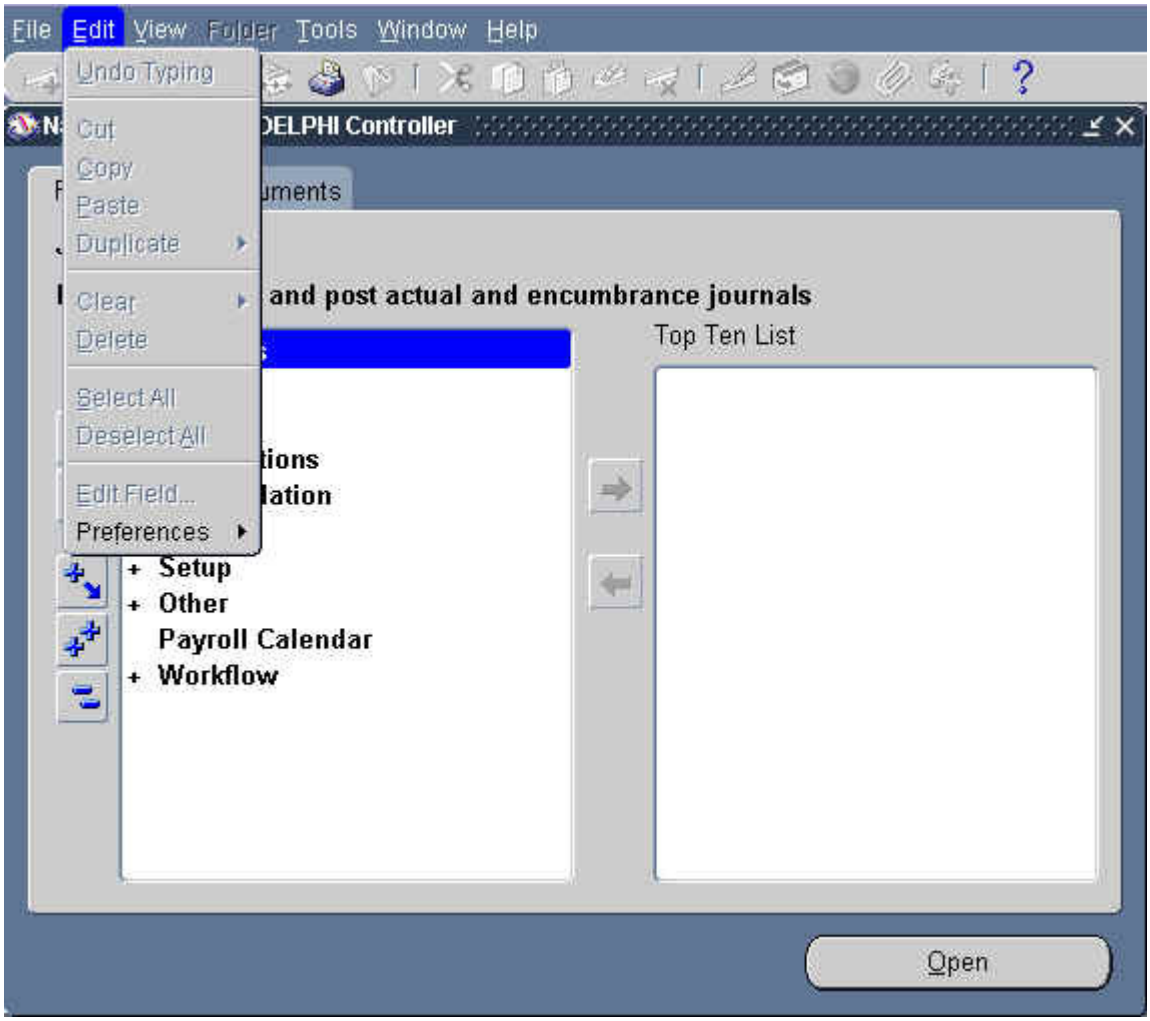
Switch Responsibility	Closes all active windows and displays the Responsibility window.
Print	Prints your current window. An application may override this action to instead allow printing of one or more specific reports.
Close Form	Closes all windows of the current form.
Exit Oracle Applications	Quits Oracle Applications.

Edit Menu



Use the Edit menu to edit your data in Oracle Applications:

EDIT MENU	
Menu Item	**Comments**
Undo Typing	Undoes any typing done in a field before the field is exited and returns the field to the most recent value.
Cut	Cut the current selection to the clipboard.
Copy	Copy the current selection to the clipboard.
Paste	Paste the contents of the clipboard into the current field.

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Duplicate Dropdown Menu	
Duplicate Record Above	Copies all values from the prior record to the current record.
Duplicate Field Above	Copies the value from the current field from prior row.
Clear Dropdown Menu	
Clear Record	Erases the current record from the window.
Clear Field	Clears the data from the current field.
Clear Block	Erases all records from the current block.
Clear Form	Erases any pending changes from the current form.
Delete	Deletes the current record from the database.
Select All	Selects all records (for blocks with multi-select).
Deselect All	Deselects all selected records except for the current record (for blocks with multi-select).
Edit Field	Displays the Editor window for the current field.
Preferences Dropdown Menu	
Preferences Change Password	Displays the Change Password dialog box.
Preferences Profiles	Displays the Profiles window.

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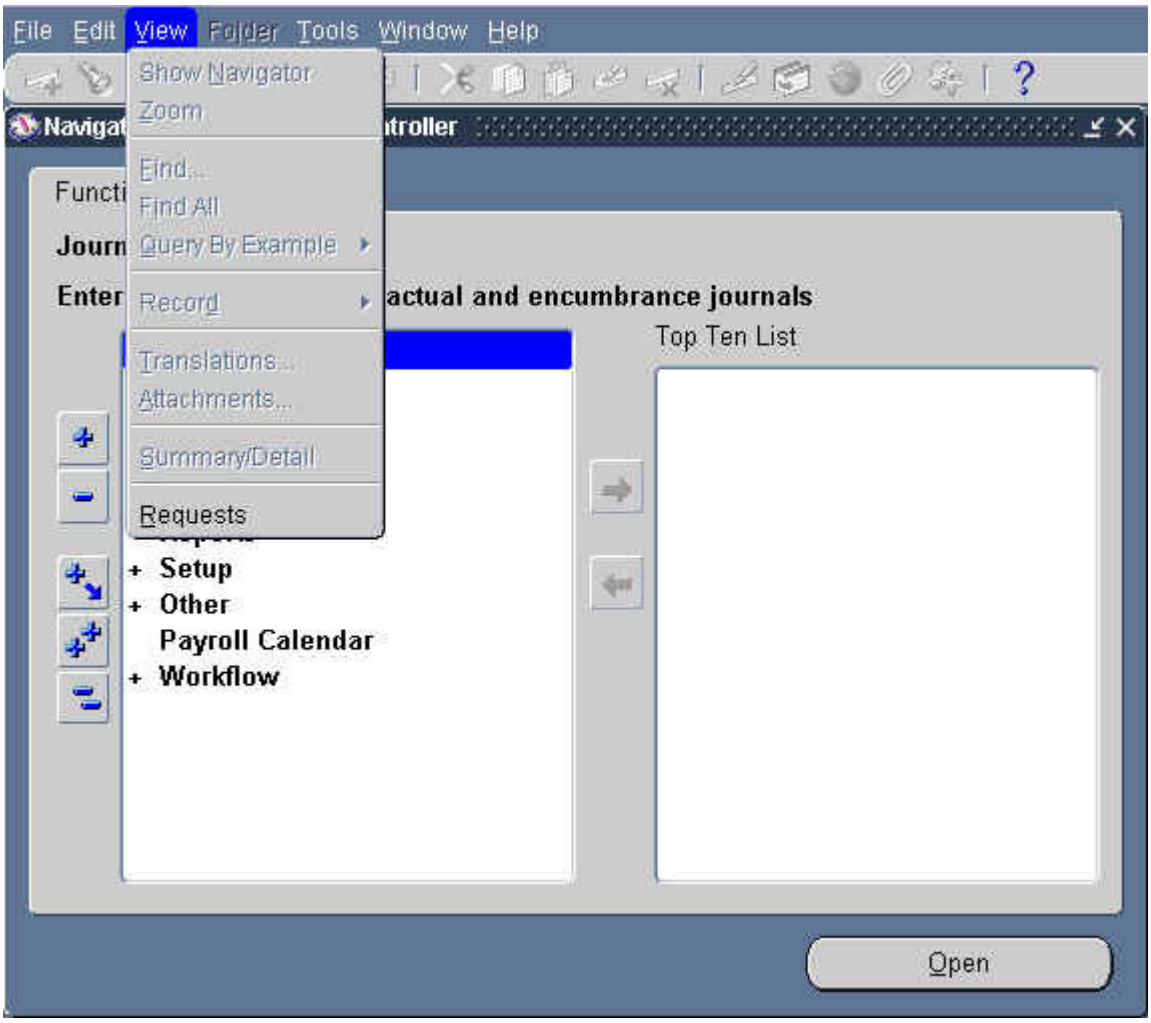
View Menu



The View menu provides you with the following options:

VIEW MENU	
Menu Item	**Comments**
Show Navigator	Displays the Navigator window.
Zoom	Invokes custom defined zooms.
Find	Displays the Find window to retrieve records.
Find All	Retrieves all records.
Query By Example Dropdown Menu	
Query By Example Enter	Invokes 'Entry Query' mode to enter search criteria by a query-by-example.
Query By Example Run	Executes the query-by-example.
Query By Example Cancel	Cancels the query-by-example by exiting from 'Example Query' mode.
Query By Example Show Last Criteria	Recovers the search criteria used in the previous query-by-example.

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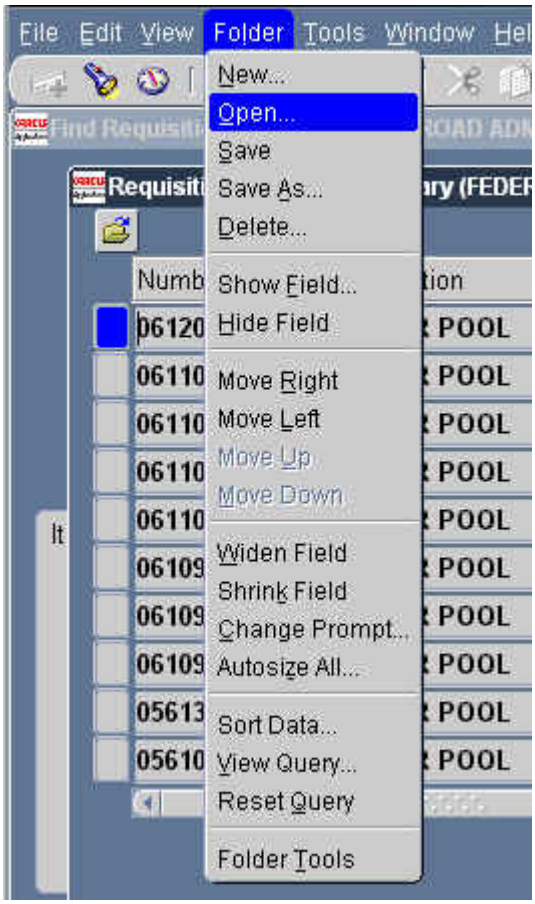
Query By Example Count Matching Records	Counts the number of records that would be retrieved if you ran the current query-by-example.
Record Dropdown Menu	
Record First	Moves the cursor to the first record.
Record Last	Moves the cursor to the last record.
Translations	Displays the Translations window.
Attachments	Displays the Attachments window.
Summary/Detail	Switch between the summary and detail views of a combination block
Requests	Displays the Request window.

Folder Menu



The Folder menu lets you customize the presentation of data in a folder.

FOLDER MENU	
Menu Item	**Comments**
New	Creates a new folder definition.
Open	Opens an existing folder definition.
Save	Saves changes to the current folder definition.
Save As	Saves current folder definition to a new name.

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Delete	Deletes An existing folder definition.
Show Field	Displays a field that is currently hidden.
Hide Field	Hides the current field.
Move Right	Moves the current field to the right.
Move Left	Moves the current field to the left.
Move Up	Moves the current field up.
Move Down	Moves the current field down.
Widen Field	Increased the width of the current field.
Shrink	Decreases the width of the current field.
Change Prompt	Changes the prompt for the current field.
Autosize All	Adjusts all field widths to completely show their data.
Sort Data	Specifies sort order for the first three fields by ascending, descending and no ordering.
View Query	Displays the query criteria for the current folder definition.
Reset Query	Erase the current query criteria.
Folder Tools	Display the folder tool palette.

Tools and Special Menus

The Tools menu represents the pulldown options available when the Navigator window is active.

Special menus A and B (default set to Reports and Actions) used in addition to the Tools menu are used configurable to allow the addition of application-specific commands. These menus can be removed if they are not needed by the application.

The menus may contain up to fifteen product-specific entries. Examples of product-specific entries may include a list of commonly used Inquiry windows in the application, or a commonly used window that a user may want to display for a quick reference.

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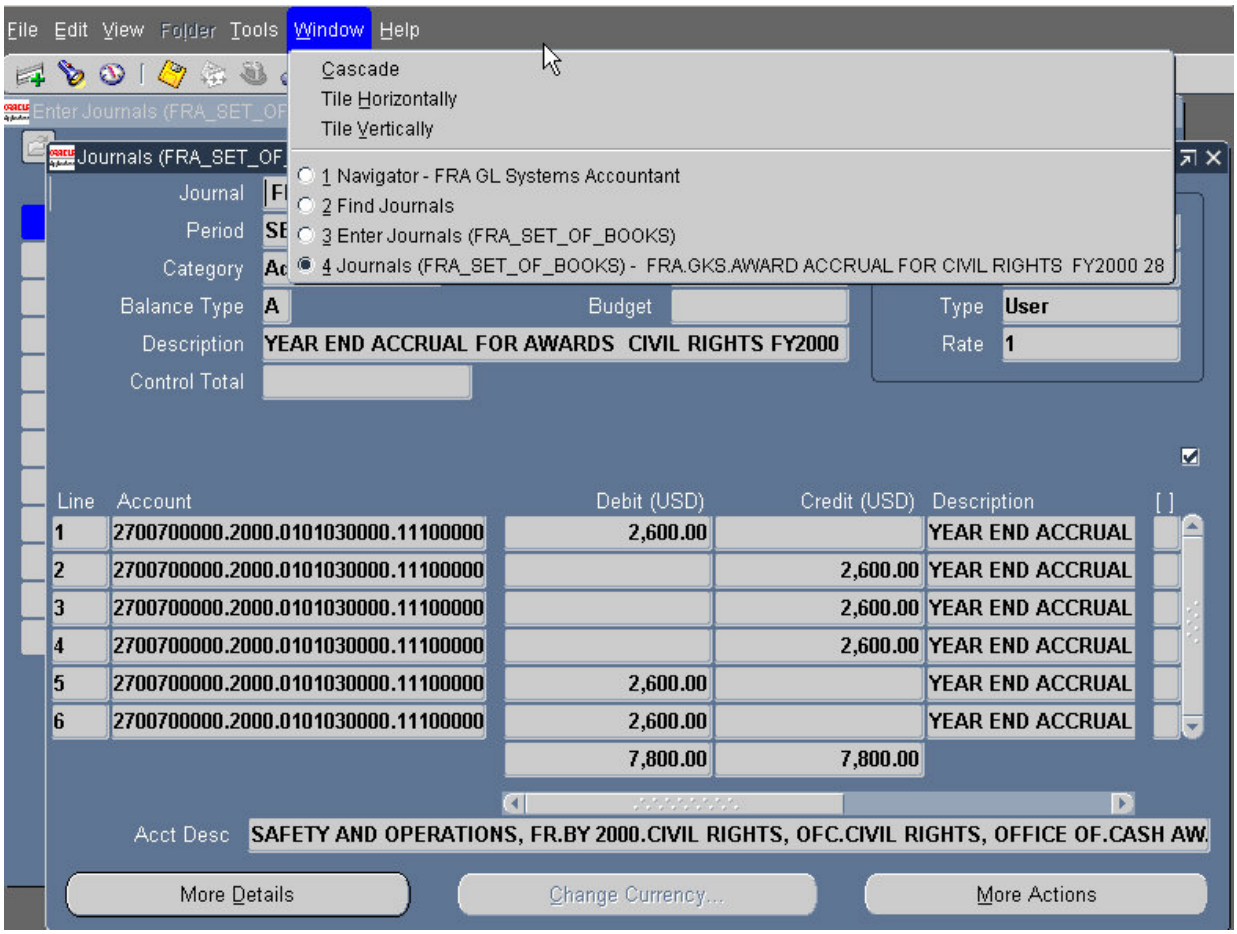
Window Menu



The Window menu displays the names of all open application windows and window placement options.

WINDOW MENU	
Menu Item	**Comments**
Cascade	Displays any open windows in a "cascaded" or stair-stepped fashion.
Tile Horizontally	Displays any open windows in a horizontally "tiled" (non-overlapping) fashion.
Tile Vertically	Displays any open windows in a vertically "tiled" (non-overlapping) fashion.
1 (Open Window)	Displays a list of open windows titles in the order in which they are stacked.

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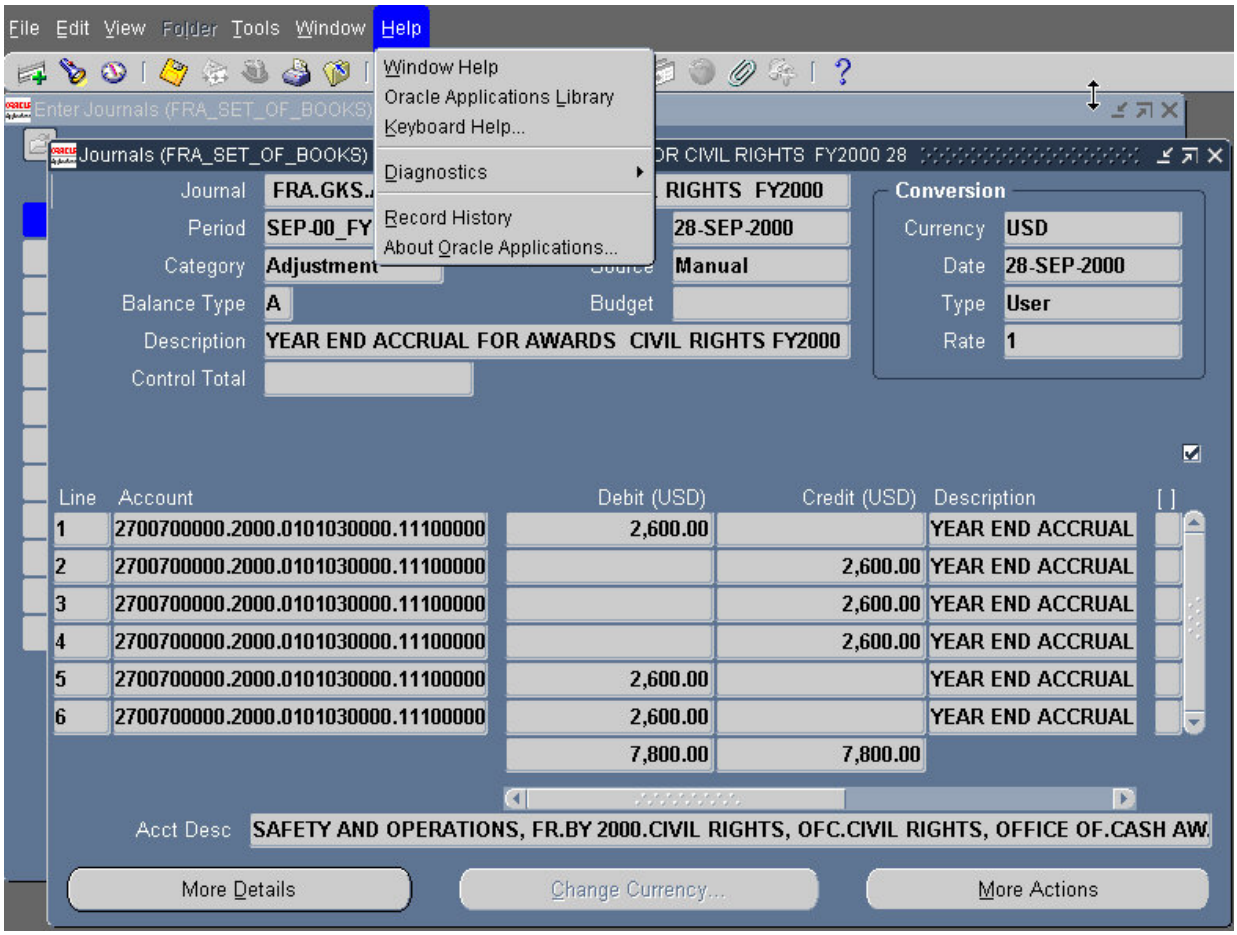
Help Menu



Use the Help menu to get additional information about Oracle Applications:

HELP MENU	
Menu Item	**Comments**
Window Help	Displays help for the current window.
Oracle Applications Library	Displays a window that lists all available Oracle Applications help text.
Keyboard Help	Displays the current key mappings of specific functions and menu options.
Diagnostics Dropdown Menu	
Diagnostics Display Database Error	Displays the last database error. All of the entries in the Diagnostics menus are used for debugging. You may be asked to use some of these functions if you need to contact Oracle Support. Before you can use these functions, your system administrator must set the profile option *Utilities: Diagnostics* to Yes.
Diagnostics Test Web Agent	Verifies that your Web Agent is setup correctly.
Diagnostics Examine	Displays the underlying block and item (displayed as *Field*) corresponding to a field on the form.
Diagnostics Trace	Toggles on or off the SQL Trace facility for the current session. SQL Trace provides performance information on individual SQL statements

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Diagnostics Debug	Turns on the Debugger, provided the form you are currently in was started in debut mode.
Diagnostics Properties Item	Displays the values for properties of the current item.
Diagnostics Properties Folder	Writes diagnostic information about the current folder to a file in the working directory.
Diagnostics Custom Code Normal	The custom library is used. This is the default. The Custom Code submenu is an option group allowing you to change the mode of the custom library used by Zoom.
Diagnostics Custom Code Off	Turns the custom library off, disabling Zooms.
Record History	Displays information about the current record.
About Oracle Applications	Displays information about the current window and application, including version information.

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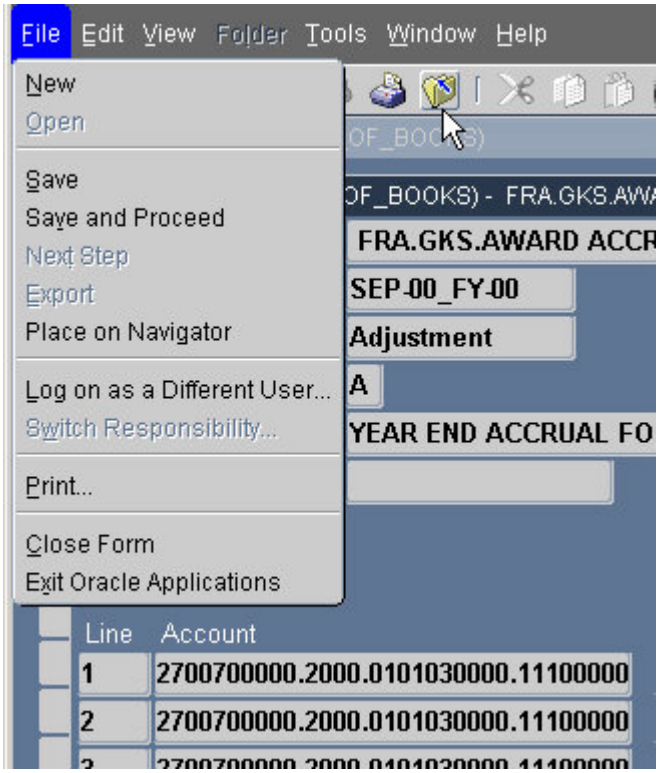
Using the File Menu

Toolbar

Oracle Applications M → File File Menu



Using the File Menu from the Menu Bar

FILE MENU	
Menu Item	**Comments**
New	Opens a new record in the active form.
Open	Opens the detail screen for the current selection.
Save	Saves any pending changes in the active form.
Save and Proceed	Saves any pending changes in the active form and advances to the next record.
Next Step	Updates the Process workflow in the Navigator by advancing to the next step in the process.
Export	Exports information in your folder form to a browser.
Place on Navigator	Creates an Icon in the Documents tab of the Navigator that can be used to recall the active form and its current record.

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Log on as a Different User	Not Available.
Switch Responsibility	Closes all active windows and displays the Responsibility window.
Print	Prints your current window. An application may override this action to instead allow printing of one or more specific reports.
Close Form	Closes all windows of the current form.
Exit Oracle Applications	Quits Oracle Applications.

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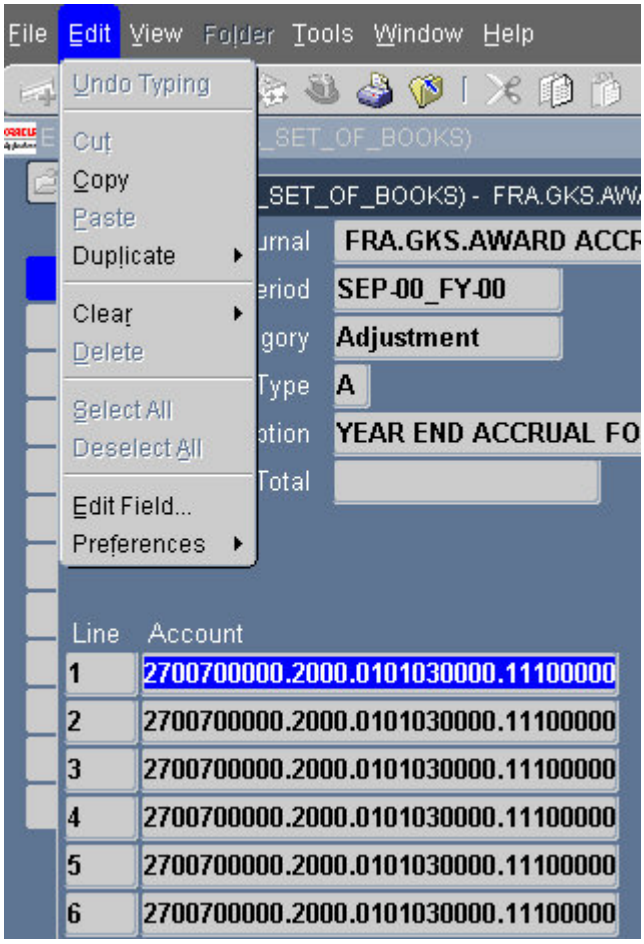
Toolbar

Oracle Applications M → Edit Edit Menu



Using the Edit Menu from the Menu Bar

EDIT MENU	
Menu Item	**Comments**
Undo Typing	Undoes any typing done in a field before the field is exited and returns the field to the most recent value.
Cut	Cut the current selection to the clipboard.
Copy	Copy the current selection to the clipboard.

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Paste	Paste the contents of the clipboard into the current field.
Duplicate Record Above	Copies all values from the prior record to the current record.
Duplicate Field Above	Copies the value from the current field from prior row.
Clear Record	Erases the current record from the window.
Clear Field	Clears the data from the current field.
Clear Block	Erases all records from the current block.
Clear Form	Erases any pending changes from the current form.
Delete	Deletes the current record from the database.
Select All	Selects all records (for blocks with multi-select).
Deselect All	Deselects all selected records except for the current record (for blocks with multi-select).
Edit Field	Displays the Editor window for the current field.
Preferences Change Password	Displays the Change Password dialog box.
Preferences Profiles	Displays the Profiles window.

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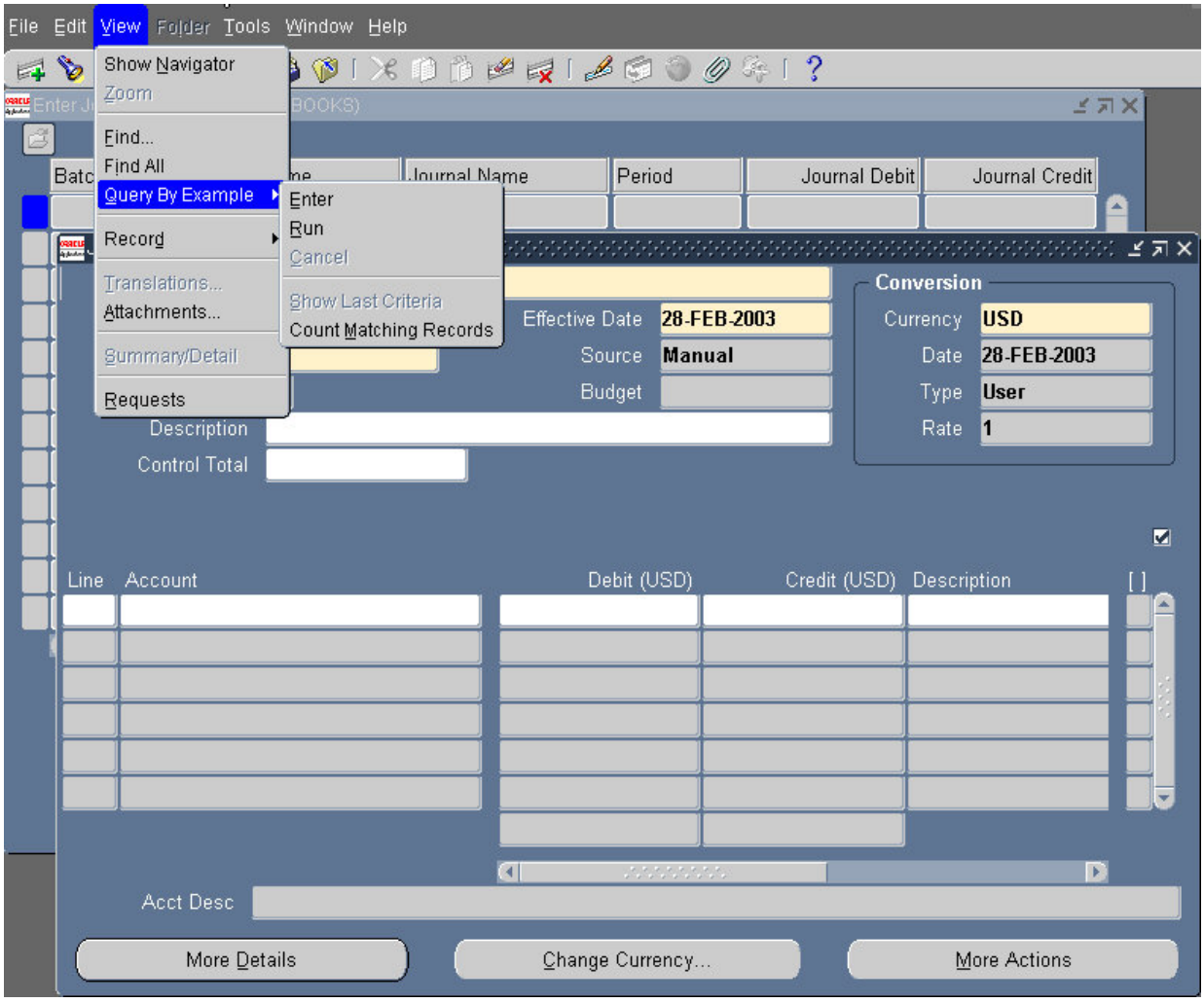
Using the View Menu

Toolbar

Oracle Applications M → View View Menu



Using the View Menu from the Menu Bar

VIEW MENU	
Menu Item	**Comments**
Show Navigator	Displays the Navigator window.

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Zoom	Invokes custom defined zooms.
Find	Displays the Find window to retrieve records.
Find All	Retrieves all records.
Query By Example Drop Down Menu	
Query by Example Enter	Invokes 'Entry Query' mode to enter search criteria by a query-by-example.
Query by Example Run	Executes the query-by-example.
Query by Example Cancel	Cancels the query-by-example by exiting from 'Example Query' mode.
Query by Example Show Last Criteria	Recovers the search criteria used in the previous query-by-example.
Query by Example Count Matching Records	Counts the number of records that would be retrieved if you ran the current query-by-example.
Record Drop Down Menu	
Record First	Moves the cursor to the first record.
Record Last	Moves the cursor to the last record.
Translations	Displays the Translations window.
Attachments	Displays the Attachments window.
Summary/Detail	Switch between the summary and detail views of a combination block
Requests	Displays the Request window.

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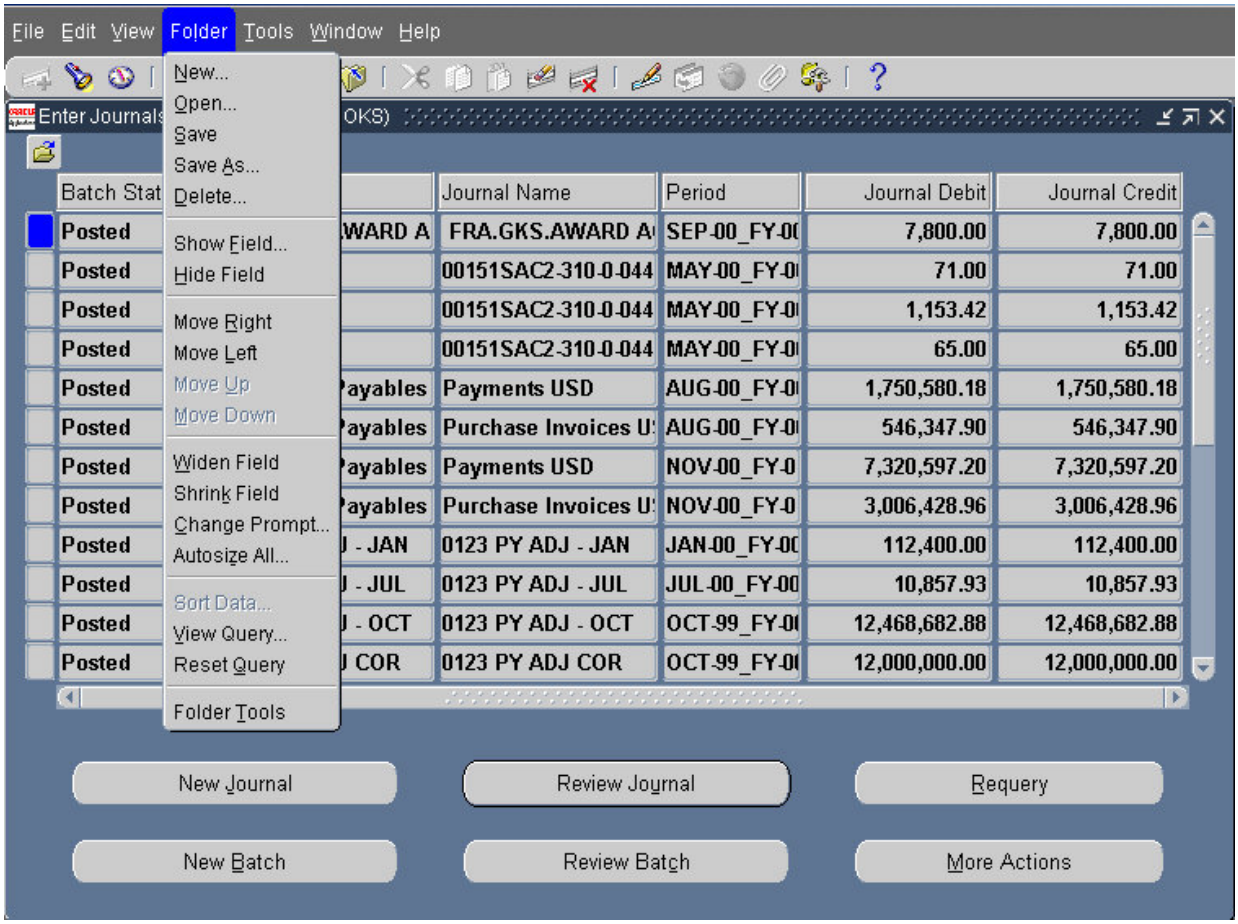
Using the Folder Menu

Toolbar

Oracle Applications
M → Folder
Folder Menu



Using the Folder Menu from the Menu Bar

You can personalize the presentation of data within a form by using a folder definition. With a folder definition you can modify the width, sequence, and prompts of the fields you want to display. Additional features of a folder definition are:

Displaying only those fields you are interested in viewing

Displaying a subset of records based on your specific criteria

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Automatically querying for a subset of records each time you open a specific folder

Keeping your folder customizations private or making them public for others to use

Making your customizations the default layout for a folder

Note: Using Folders is covered in detail in the upcoming lesson "Customizing the Presentation of Data."

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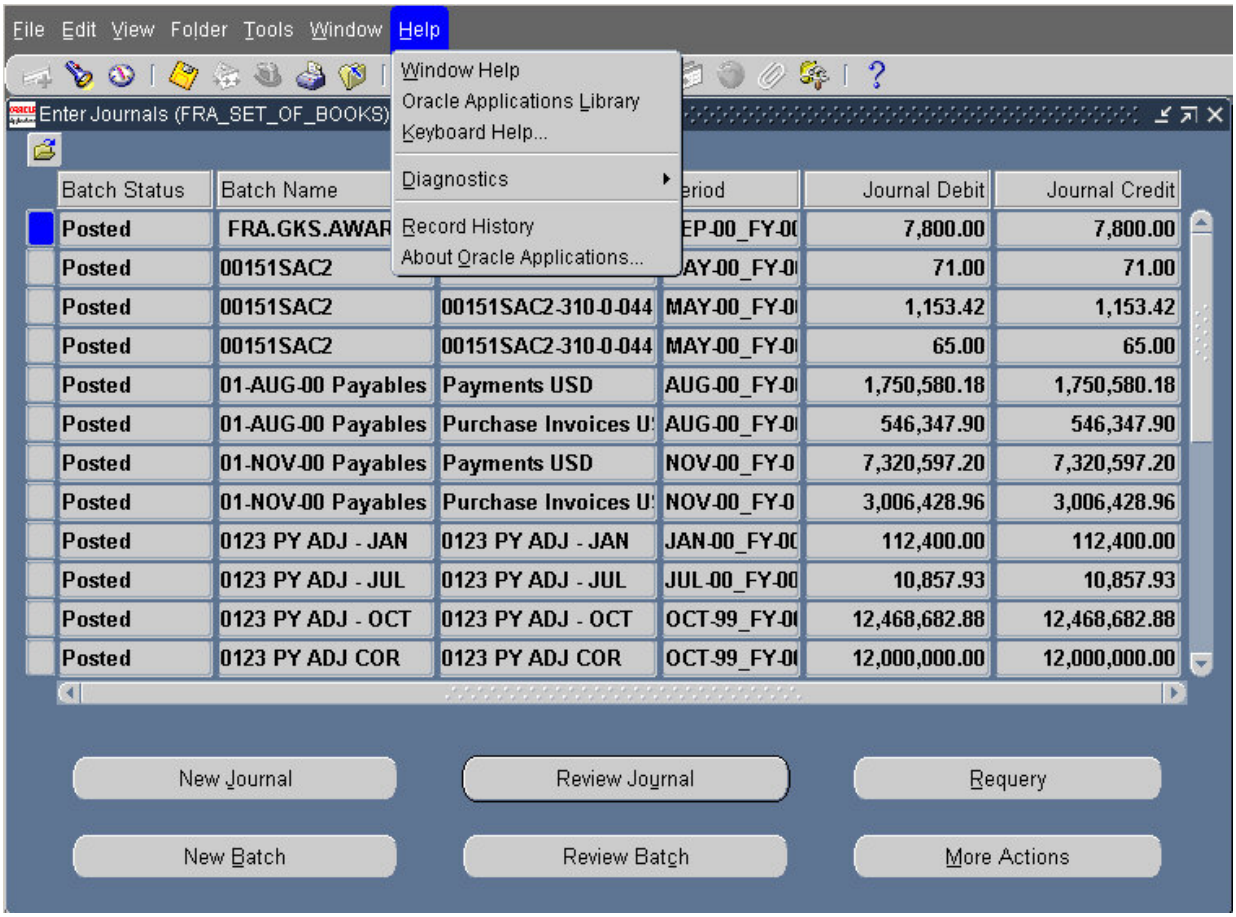
Using the Help Menu

Help Menu

Oracle Applications
M → Help
Help Menu



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HELP MENU	
Menu Item	**Description**
HELP Main Menu	
Window Help	Displays help for the current window.
Oracle Applications Library	Displays a window that lists all available Oracle Applications help text.
Keyboard Help	Displays the current key mappings of specific functions and menu options.
Diagnostics	
Record History	Displays information about the current record.
About Oracle applications	Displays information about the current window and application, including version information.

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Summary

- Form terminology
- The Oracle Applications Toolbar Window
- Toolbar icons
- Keyboard shortcuts
- Toolbar menus

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Lab 1: Using Forms and Menus

Answer the following questions to reinforce the basic concepts of using forms and menus within Oracle Applications.

1. List three different ways that you can save a record.

2. What is the keyboard shortcut to enter a query?

3. Where can you find online assistance if you require clarification while using an application?

4. What is the keyboard shortcut to bring up a list of values?

5. How do you change responsibilities without exiting the application?

6. What does the toolbar icon with the yellow disk mean?

7. Which Navigator button fully expands your selection in the Navigator window?

8. Where on your desktop can you view all active windows while running Oracle Applications?

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Lab 1 Solutions: Using Forms and Menus

1. List three different ways that you can save a record.

   Use the Save toolbar icon.

   Choose Save from the File menu in the Toolbar window.

   Use the keyboard shortcut for Commit, Ctrl + S.

2. What is the keyboard shortcut to enter a query?

   [F11]

3. Where can you find online assistance if you require clarification while using an application?

   Online Help.

4. What is the keyboard shortcut to bring up a list of values?

   [CTRL] + [L]

5. How do you change responsibilities without exiting the application?

   Select File, then Switch Responsibility from the Menu Bar.

6. What does the toolbar icon with the yellow disk mean?

   Save

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7. Which Navigator button fully expands your selection in the Navigator window?

   The icon containing two plus signs stacked on one another.

8. Where on your desktop can you view all active windows while running Oracle Applications?

   The Taskbar window on your desktop displays icons for active program windows that have been collapsed.

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Accessing Online Help

Chapter 4

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Accessing Online Help

Section Objectives

At the end of this section, you should be able to:

- Display Help information online
- View explanations for application messages and errors
- Identify who created and updated a row of data

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Accessing Window Help

Window Help

Oracle Applications
M → Help → Window Help
Window Help

Accessing Window Help

Oracle Applications provides you with a complete online Help facility through your web browser tool.

How to Display Help for a Current Window

1. Select (M) Help → Window Help. A Help window is displayed, providing information and a list of topics associated with the current application window.

2. Select a topic of interest to display more detailed information or perform a search within the Oracle Applications Online Help. Find field located in the top left corner of the window.

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3. Use the menus or buttons in the Help window to navigate to other topics of interest, or from the File menu in the Help window, select (M) File → Close to leave Help.

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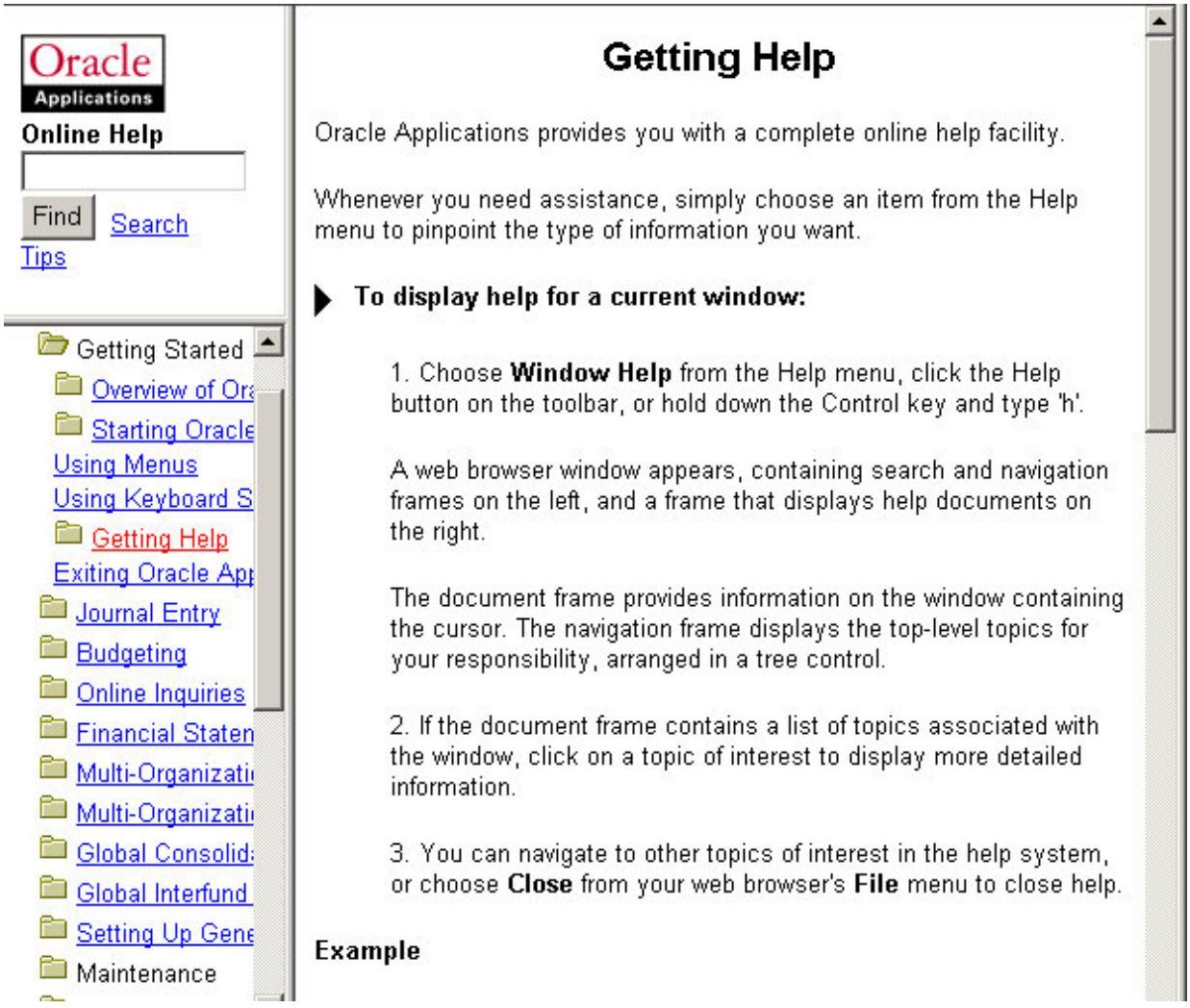
Oracle Applications Library

Oracle Applications
M → Help → Oracle Applications Library
Oracle Applications Library



You can obtain or gain access to online Help for any Oracle Applications product and reference that products documentation online as well.

How to Display Online Help for Any of the Oracle Applications Products

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1. Select (M) Help: Oracle Applications Library.

2. Select on a product of interest to display the contents (list of topics) for that product's online documentation.

3. Select a topic of interest to display a list of subtopics for the topic.

4. Select a topic to display a window with Help on that topic.

5. Select Contents from the Help window to return to the main list of topics for this product at any time.

6. Select (M) File: Close to close the Help window when you are finished.

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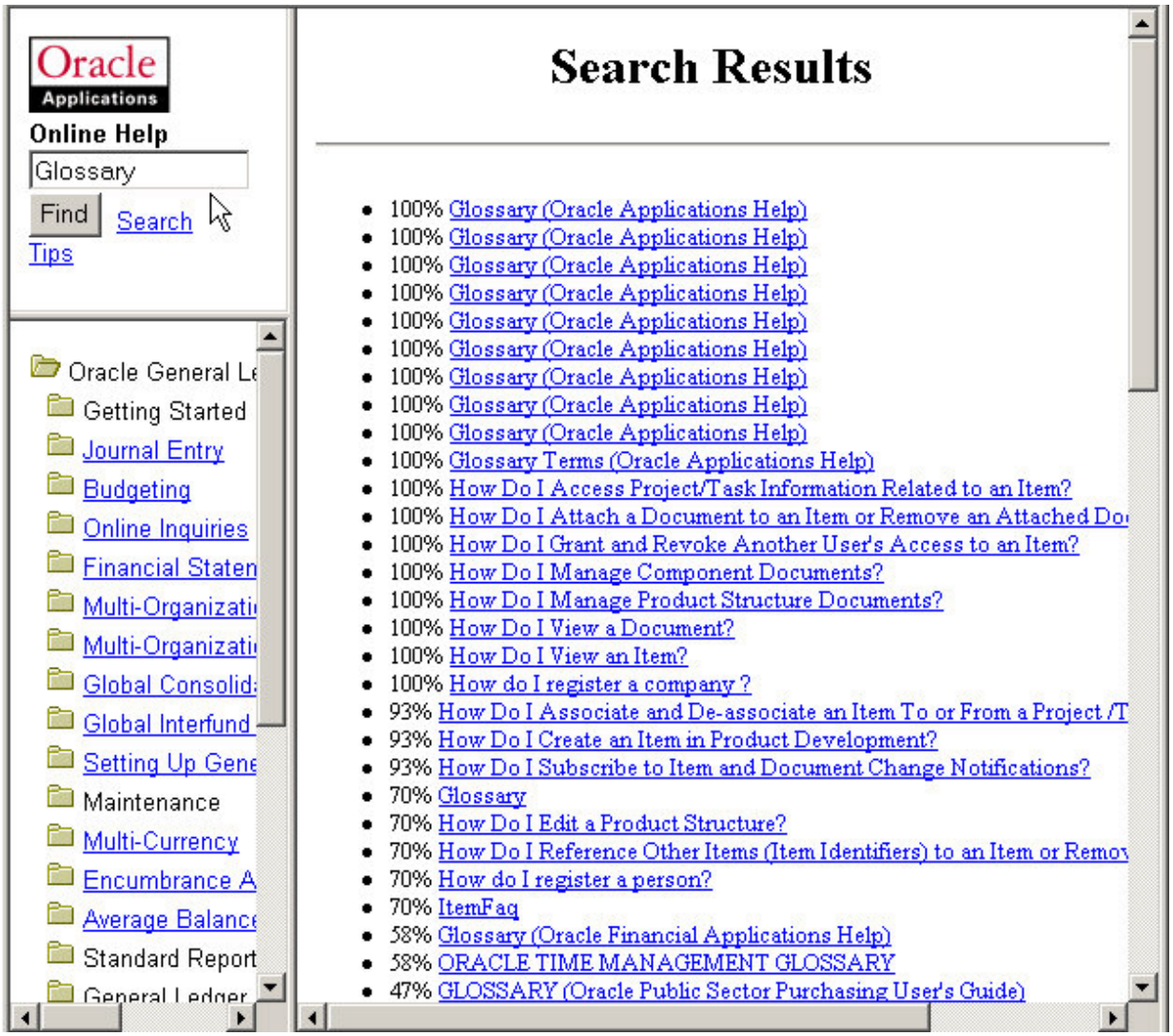
Using the Glossary

Glossary

Oracle Applications
M → Help → Window Help
B → Find
B → Glossary
Glossary



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Using the Glossary

The glossary provides online Help information by topic, alphabetically.

1. To open the glossary, select (M) Help → Window Help.

2. Search for Glossary. Select Find. Select the related document.

The information contained in the glossary is primarily reference, or brief descriptions of each topic. More detailed information on the topic can be found in Window Help.

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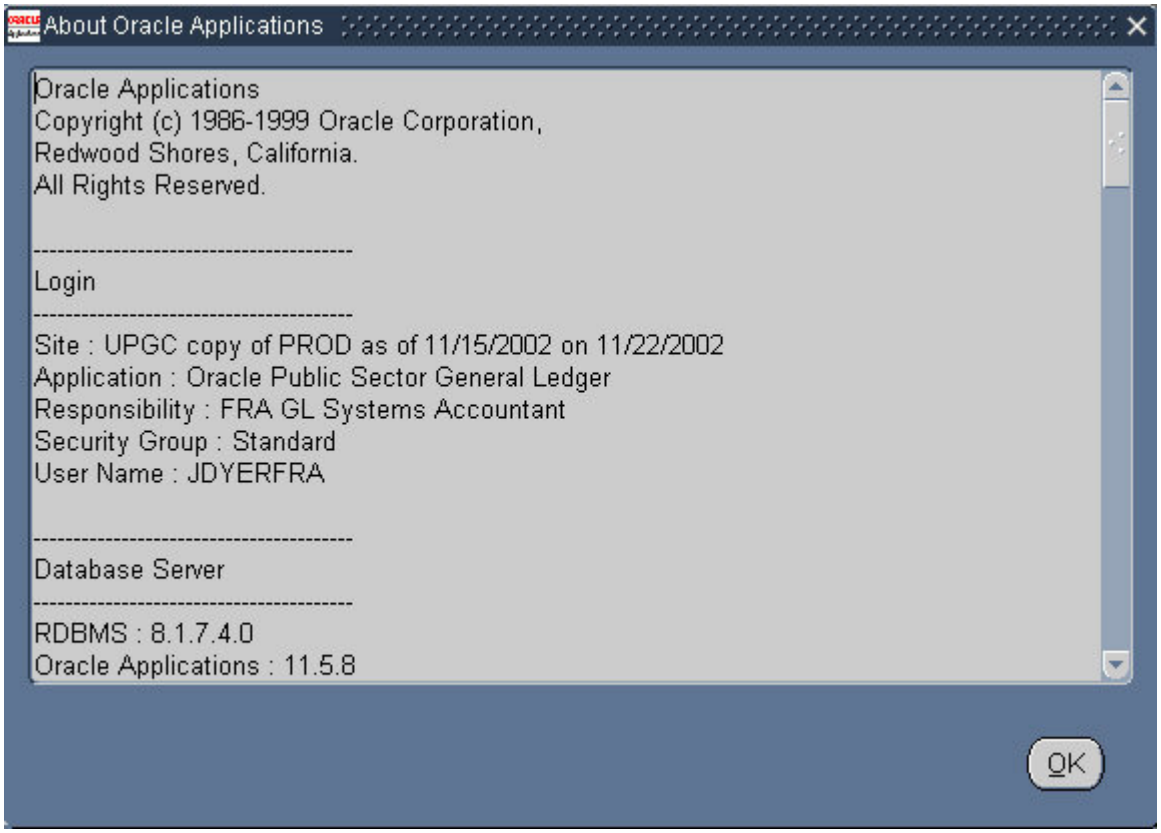
About Oracle Applications

Oracle Applications
M → Help → About Oracle Applications
About Oracle Applications



Online Information About Oracle Applications

You can obtain details about the version of Oracle Applications you are using, your login information, and details regarding the current form you are using by using the online Help window. This information is useful if you have an error message and/or need assistance please call the DELPHI Help line.

How to Display Version Information for Oracle Applications

1. Select (M) Help → About Oracle Applications.

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2. Select (B) OK to close this window when you are finished.

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Display Database Error

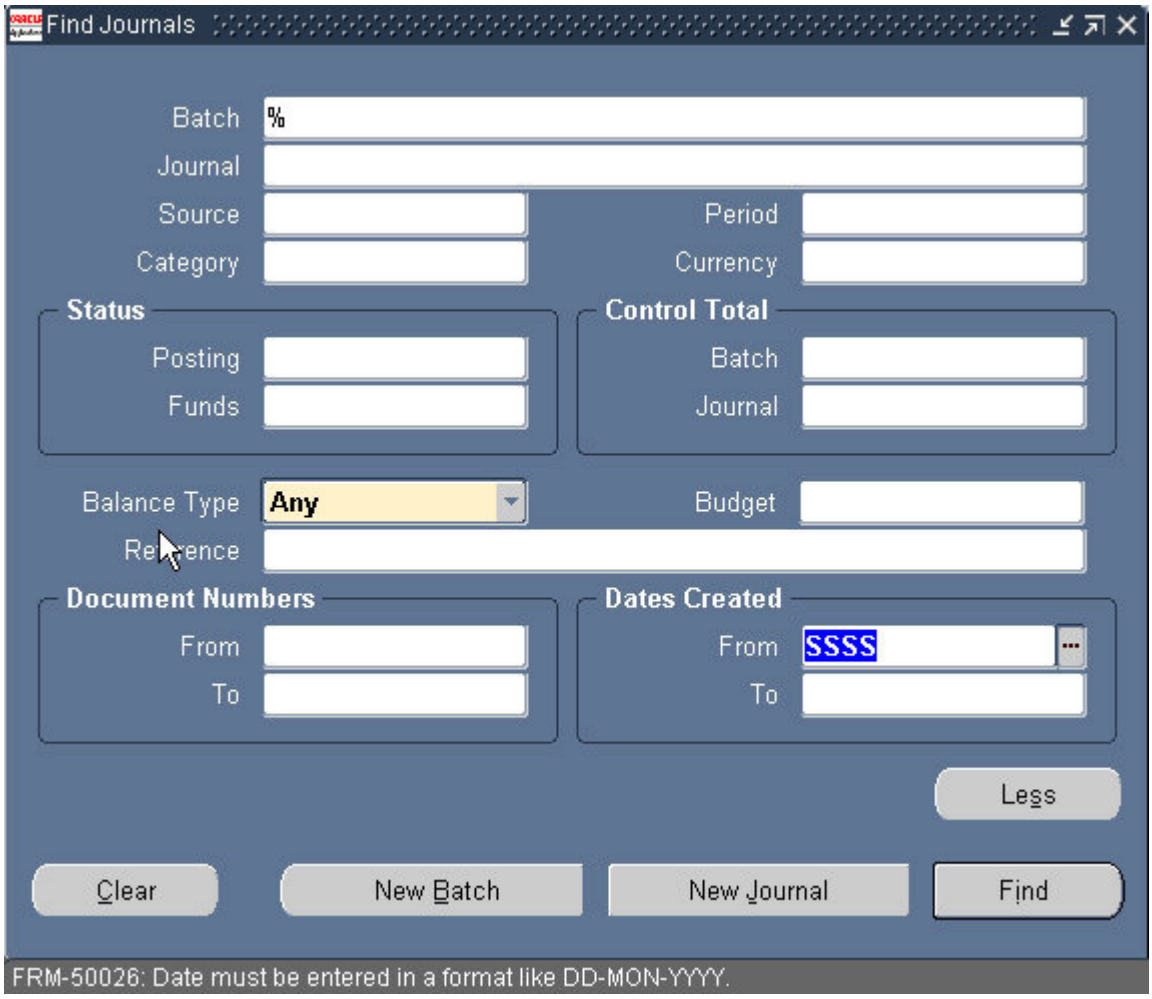
Error Message Codes

Generally, messages and errors are preceded by a message or error code.

- Codes that are prefixed by FRM arise from Oracle Forms, the underlying product that provides Oracle Applications with its graphical user interface.
- Codes that contain the prefix ORA arise from the Oracle database.
- Codes that are prefixed by APP arise from Oracle Applications.

These codes help your system administrator or Oracle Customer Support expert diagnose the errors you encounter.

The message line below shows a FRM error due to "SSSS" being invalid as a date entry.



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Learning About a Record

About This Record

Oracle Applications
M → Help → Record History
About This Record

Learning About a Record

You can always display information about a record that has been previously saved. This record information includes who created the record, the date of creation, and the database table where the record resides. You can also learn who last changed the record using Oracle Applications, the date of the change, and that user's logon and terminal information (if the terminal information has been specifically designated by your system administrator).

How to Learn About the Current Record

1. Select (M) Help →Record History. A window appears that shows you information about the current record.

2. Select (B) OK to close the window.

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Summary

- Accessing online Help
- Oracle Applications library and Glossary
- About Oracle Applications help window
- Error Messages
- About this record help window

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Lab 1: Accessing Online Help

1. Name two ways to access Window Help.

2. What is the name of the Help feature that tells when the record was last updated, and how do you access it?

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Lab 1 Solutions: Accessing Online Help

1. Name two ways to access Window Help.

   From the menu in the Toolbar window, select Help → Window Help.

   Select the question mark icon in the Toolbar window.

2. What is the name of the Help feature that tells when the record was last updated, and how do you access it?

   The help feature is called Record History and it is accessed by selecting Help → Record History from the menu in the Toolbar window.

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Entering Data Using Forms

Chapter 5

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Entering Data Using Forms

Section Objectives

At the end of this section, you should be able to:

- Enter data into a form using various editing functions
- Delete data from a form or from the database
- Use a list of values to simplify your data entry
- Enter a date using the calendar
- Save edits to the database

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Creating and Deleting Records

Creating New Records

New

Creating a New Record

When you add a new record to the database, Oracle Applications will move the current record down and insert a new blank row. You add a new record by entering information into this blank row.

After you finish entering the data for your new record, you must remember to select Save so that your newly added information will be written to the database. If you enter five new blank rows of information but do not select Save when you are finished, none of this newly added information will be updated in the database.

How to Create a New Record

1. From the Toolbar menu, Select File → New or select New Record.

   You can also select the down arrow on your keyboard to insert a blank row, if you are not in a table on the form. Additionally, some applications have a button labeled New, and selecting it will insert a blank row.

2. Type the new information into the blank row.

3. Choose File → Save, or File → Save and Proceed, or select Save to save the new record.

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Deleting Records

Delete

Deleting a Record from the Database

If you want to delete a record from the database, you must first display the record on your form and then select Delete Record.

Note: This option is not always available. For example, in Oracle Applications you cannot delete a customer once they have been entered; you can only inactivate their status.

If you do not Save this new change to the database, the record is not truly deleted.

How to Delete a Record

1. Choose M → Edit → Delete Record, or Select Delete Record.
2. Choose File → Save, or File → Save and Proceed, or Select Save.

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Using a List of Values

List of Values

List of Values

Using the LOV

The List of Values (LOV) feature is very useful while entering data in Oracle Applications. It provides you with a powerful, easy-to-use data entry method that increases your accuracy and productivity. Using the LOV makes data entry an easy task for novice users, and experienced users can enter correct data with a minimum number of keystrokes.

Oracle Applications notifies you when a list of acceptable input values is available for a field. If a field has a LOV, a LOV icon is displayed in the field when you move your cursor to the field. Clicking on the icon displays the LOV window.

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Using a List of Values

By using the LOV feature, you can save time and enter data quickly without having to memorize or look up valid data for each field. You can choose data from an online list of valid input choices whenever you want. Additionally, you are relying on Oracle Applications to validate your input since you will know right away if your entry does not match an option from the LOV. You can also program your application to use company-specific terminology as valid values for certain standard and user-defined fields.

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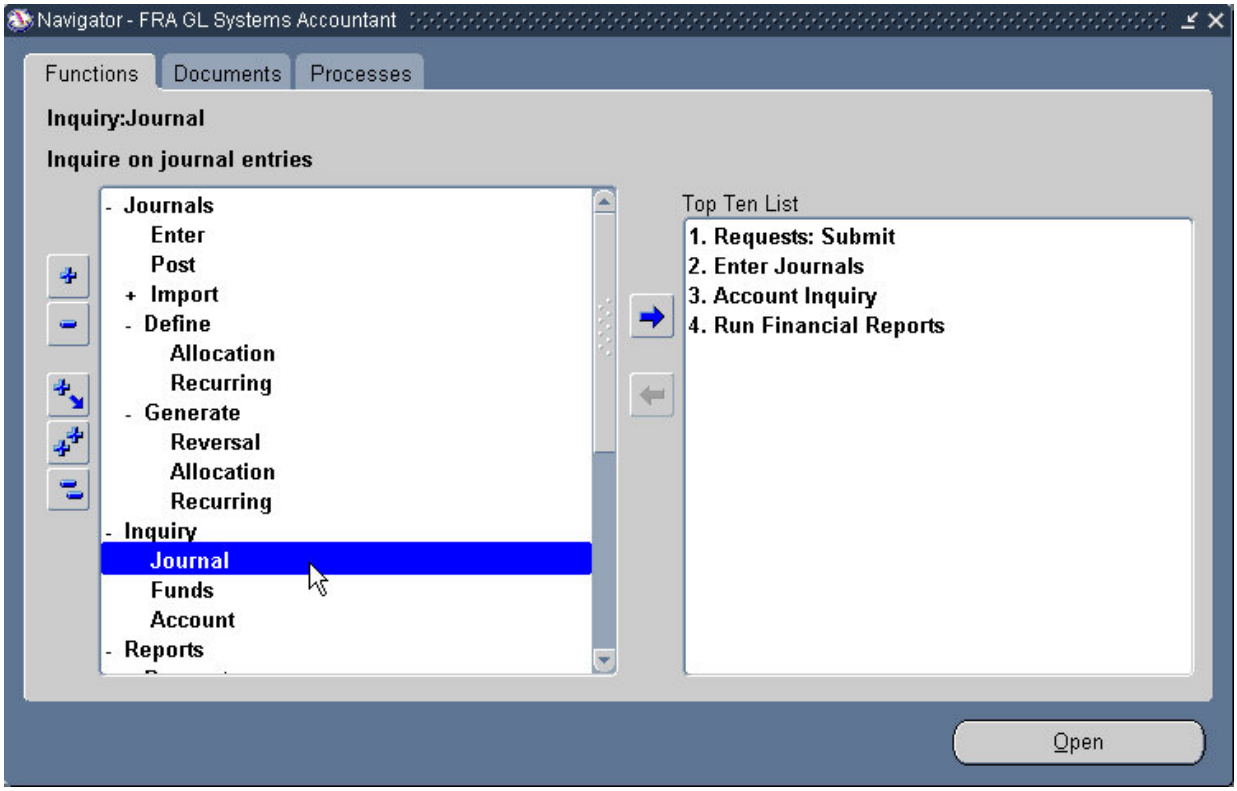
Creating a Navigation Top Ten List

Navigator

Internet Browser
N → Connect to Oracle Applications → Application Job Title
Navigator



Navigator: Functions

The Navigator Window

If there are forms that you use frequently, you can add them to a navigation top ten list located on the right side of the Navigator window. The top ten list displays your forms numerically so you can choose them instantly without having to search for them in the navigation list. You can add a maximum of ten forms to the top ten list and you can create a different top ten list for each responsibility for which you have access. A top ten list is unique for the responsibility and user sign-on combination that you use.

How to Create a Navigation Top Ten List

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1. Select a frequently used form from the navigation list by highlighting it in the Navigator window.

2. Select (B) Arrow (→).

3. Select (B) Arrow (←).

4. Enter the top ten list number that precedes the form you want to open.

Note: Sometimes the form that you add changes names when it appears in the top ten listing. An example is that Suppliers becomes Vendors, or Orders, Returns becomes Order Workbench.

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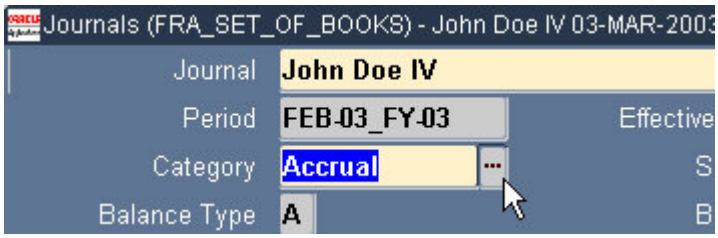
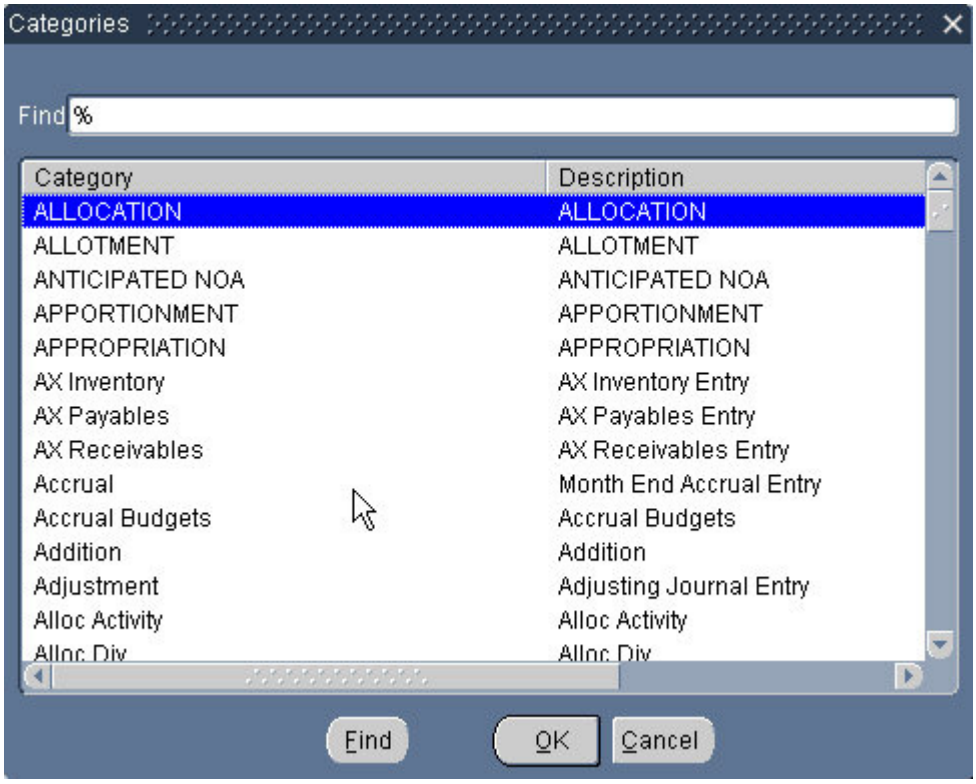
Using a List of Values

Whenever you move your cursor to a field, the list of values icon will appear in the field whenever available



Clicking on the LOV icon in the field will bring up the list of values for that field.



Choosing a Value from a List

Using the keyboard, hold [Ctrl] + [L]. To choose a value from a list, select in the field and then select the small button at the end of the field you would like to list. If you do not want to view the entire list selection, you can reduce the length of a list, or select directly from the list by using some of the methods described below.

Without selecting in the Find field, type the first character(s) of a value to reduce the list to only those values that match the characters you enter.

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Search for a value by selecting in the Find field, then enter your search criteria in the Find field and select (B) Find.

Select a value directly from the list by using the mouse to scroll through the list and then double-click the value to choose it, or select once on the value and then select (B) OK.

Once you choose a value, the list window closes and inserts the value into the current field. To close a list window without choosing a value, select (B) Cancel.

AutoSelection

Using the list of values feature called AutoSelection you can select a valid name from the list with a single keystroke. When you display the list window, you can type the first character of the name you want in the Find field. If only one choice begins with the character you enter, AutoSelection selects the choice, closes the list window, and enters the value in the appropriate field.

List Search

You can use the AutoReduction feature to reduce a list when you know the first few characters of your name selection. If you do not know the initial characters of your choice, but do know that your choice contains a certain word or set of characters, you can perform a list search to reduce a list.

In the list window, enter any group of characters as search criterion in the Find field and select the Find button. You can use wildcard characters such as the percent sign (%) that represents any number of characters, or an underline (_), which represents a single character in your search criterion.

For example, to reduce a list to only those choices that contain the phrase “schedule,” you would type %schedule% in the Find field and select Find. In any of these list search queries, it does not matter whether you use uppercase or lowercase letters as the search is not case sensitive.

Long-List Fields

If a field has a “long-list”—that is, a list of more than 100 values—Oracle Applications will display the Enter Reduction Criteria for Long List window when you try to display the LOV.

Because it takes less time to display a reduced list than a complete long-list, Oracle Applications prompts you to enter the first few characters that occur in your value of interest to reduce the complete list. However, to view the entire long-list, enter the percent sign (%) at the prompt and all of the values will be displayed.

Note: To avoid excessive network traffic and reduced performance, try to enter specific criteria, other than just a percent sign (%), whenever possible.

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Power List

The Power List feature provides an even faster method of data entry. If a field displays a List lamp and you know the value you want, simply enter the first few characters of the value in the field and press [Tab]. Power List will complete the entry for you. You can also include wildcard characters with your entry. You do not need to display the list window. If more than one value matches the characters you specify, a list window containing those values is displayed. If no values match the characters you enter, a list window containing all the values appears.

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Using the Calendar to Enter Dates

Calendar

Oracle Applications
N → Date Field → (B) LOV
B → Day
B → Time
Calendar

Choosing a Date in the Calendar Window

You can use a calendar to enter a valid value in a date field if the field displays the List lamp on the status line. If your date field supports time, you can also use the Calendar window to choose a valid time with the date.

1. Put your cursor in a valid date field.

2. Select from the menu or select (B) LOV to display the Calendar window. The date value that appears below the calendar is called the selected date, which is either the value already in the field, the default value of the field, or the current system date.

3. Highlight and select the date on the calendar that you want to select.

4. Select on a date.

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Note: Disabled buttons that show dimmed text represent invalid days, which cannot be chosen. Similarly, if a date field is display only, you can display the Calendar window for the field, but you cannot change the date shown on the calendar.

5. Select (B) OK to accept the selected date and close the window.

6. Select (B) Cancel if you want to close the window without choosing a date.

Choosing a Date and Time in the Calendar Window

1. Follow steps 1 through 5 above to choose a date. If the current field supports both date and time, the Calendar window reveals additional time items.

2. Select the hour pop-up list icon to choose a hour value. The minute pop-up list displays twelve values between 00 and 55 at 5-minute increments.

   Note: If a value already exists in the current data and time field when you display the Calendar window and the minute value is not a 5-minute increment, the minute pop-up list displays 13 values to include the minute value displayed in the field.

3. Check AM or PM and Select (B) OK to accept the selected date and time and close the window. Select (B) Cancel to close the window without choosing a date or time.

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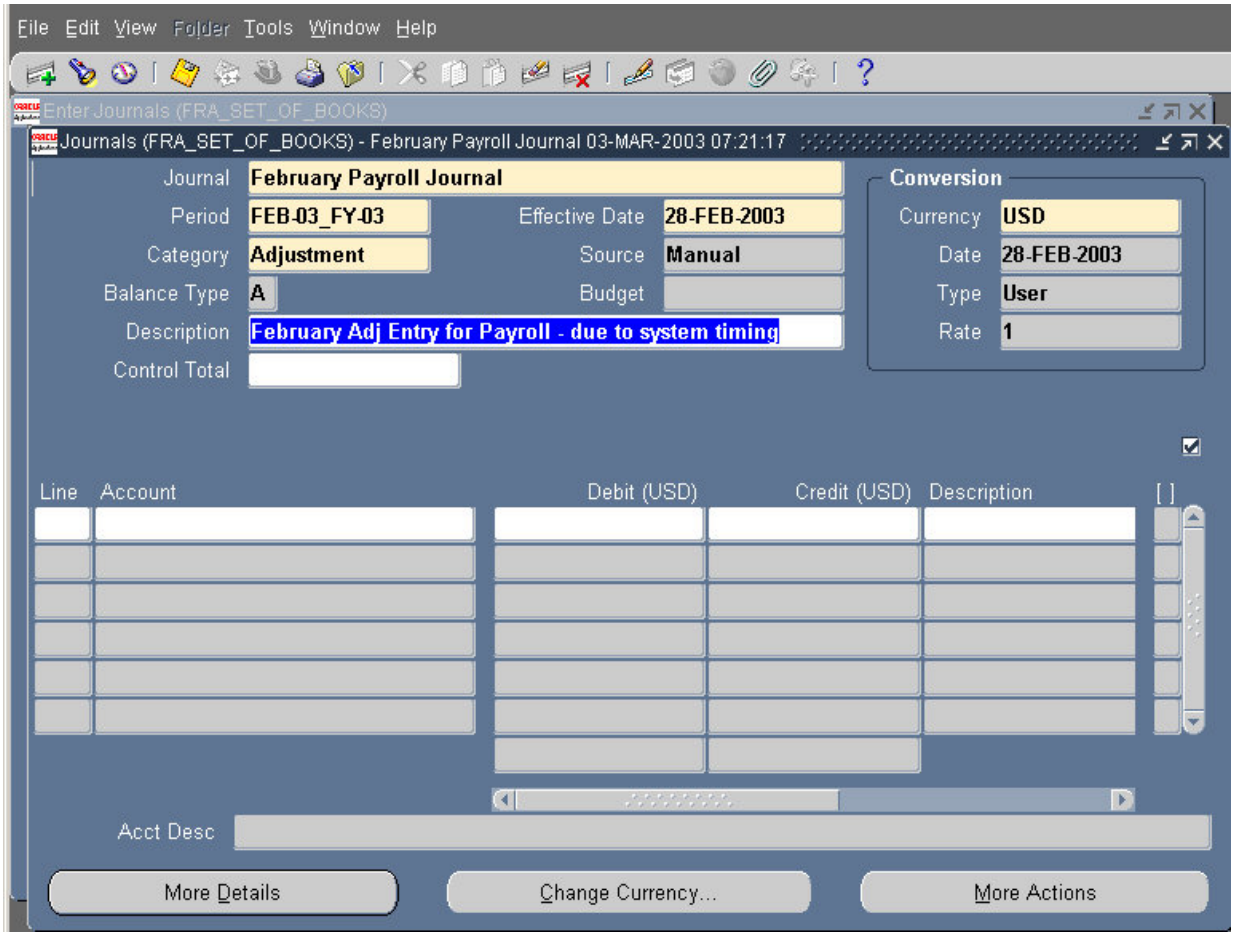
Using the Edit Function

Editor

Oracle Applications
M → Edit → Edit Field
Editor



Editing a Field

You can display an Editor window to view, enter or update the entire contents of a text field. The Editor window is especially useful for editing scrollable text fields. A *scrollable text field* is a field in which the actual width is greater than the display width, but you can review the contents by scrolling through the field.

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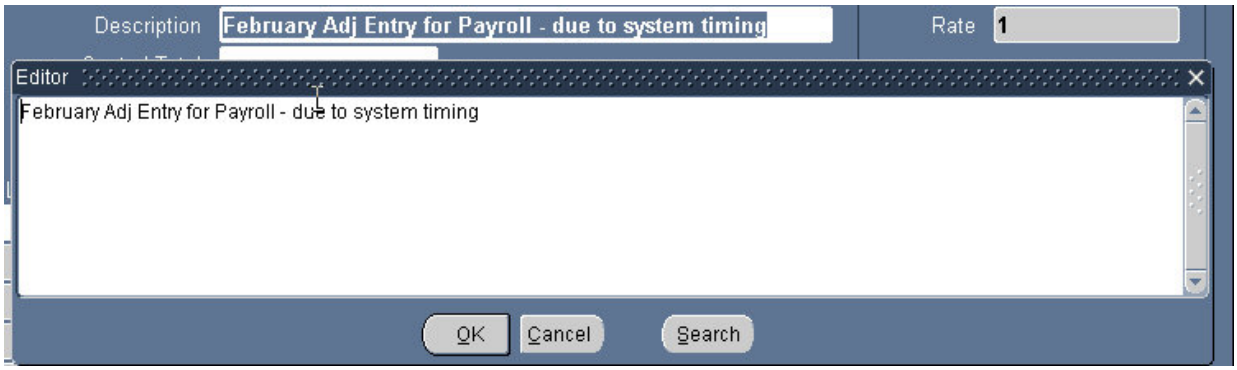
To use the Editor window for a field, choose (M) Edit → Edit Field. You can enter a new value or edit the existing value in the Editor window. If the current field is a display- only field, then the Editor window appears in display-only mode.



You can also use the Editor window to search for a phrase and replace it with another phrase. Select (B) Search in the Editor window to display a Search/Replace window. Then, enter a value in the Search For field, and enter the other value in the Replace With field. Select (B) Search to search for the value, or select (B) Replace or Replace All to search for the value and replace the first occurrence or all occurrences with your new value, respectively.

Once you are satisfied with the value in the Editor window, select (B) OK to close the window and insert the value into the field.

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Clearing Data

Clear Record

Clearing Data from a Form

You can clear data from the screen at almost any time. Typically, you will use this feature when you start to enter data into a field and then change your mind. Oracle Applications will think you are in the middle of processing a record and may not proceed with your next task until you clear the field.

The data you clear is simply erased from the screen and not deleted from the database.

Note: If the data is new and has never been saved to the database, it will be lost permanently when you clear it from the screen.

Select (M) Edit from the Toolbar window, and then the appropriate choice, to clear a field, record, block, or form.

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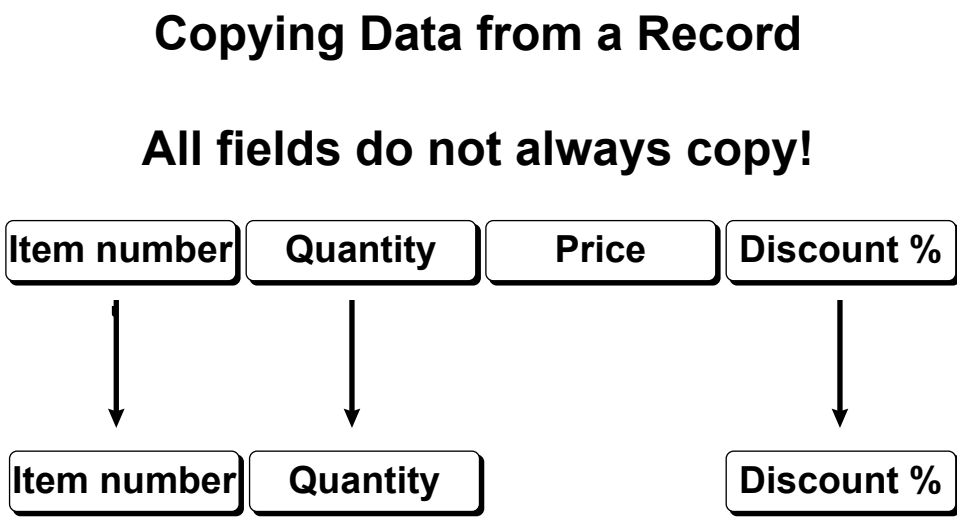

Duplicating Data from a Previous Record

To save time during data entry, you can duplicate data from a previous record if much of the data needs to be repeated again in the new record.

How to Copy a Field Value from the Previous Record

1. Enter a new record or query an existing record in your form.
2. Select M → Edit → New Record or select New Record from the toolbar to insert a new record after the existing record.
3. Place your cursor in the field whose value you want to duplicate.
4. Select M → Edit → Duplicate Field Above, to copy the field value from the previous record into the current record.

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How to Copy All Field Values from the Previous Record

1. Follow Steps 1, 2 above.

2. Select M → Edit → Duplicate Record Above, to copy all field values from the previous record into the current record.

   Note: Depending on the record storage in the database and relevant database tables, not all fields may be copied when using this feature. Be sure to check your new record carefully before you assume all fields have been copied into the new record.

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Saving Your Work

Saving a Record

Save

Saving Your Work

When you save your work, Oracle Applications updates the underlying database with the work you have done since you last saved your changes and then informs you that the transaction is complete. Saving your work is sometimes referred to as *committing a change* or *committing a transaction*.

Oracle Applications always validates your work upon saving it. If any of the data you enter is invalid or missing, Oracle Applications displays a message describing the problem and does not save the data.

To save your work, use any of the following methods:

- Select M → Action → Save, from the menu in the Toolbar window.
- Select M → Action → Save and Proceed, from the menu. This will save any changes you have made to the current window and move to the next record (new or existing) so you can enter another transaction.
- Select Save in the Toolbar window.
- Use keyboard shortcut [Ctrl] + [S].

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Summary

- Using the LOV
  - Choosing a value from a list
  - AutoSelection
  - List Search
  - Wildcard characters
- Clearing data
- Saving your work

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Lab 1: Entering Data Using Forms

As the FRA AR DELPHI Controller, you want to add a customer to your database.

For this lab, your customer will be called your name and you will use the LOV feature to enter default values for all required fields.

Note: The purpose of this lab is to familiarize you with actual data entry in a form, not to educate you on actual field values in the Oracle Receivables application, so the default values that you select for the required fields do not matter.

1. Using the FRA GL FedAdmin Systems Accountant responsibility.

2. Go to the Navigator window, select Setup → Appropriation → Define Treasury Account Codes.

3. Enter a new Treasury Account Code of 98XX where XX is your training terminal number.

4. Enter the Federal Account Symbol Name as Federal Account Symbol You Name.

5. Save your work.

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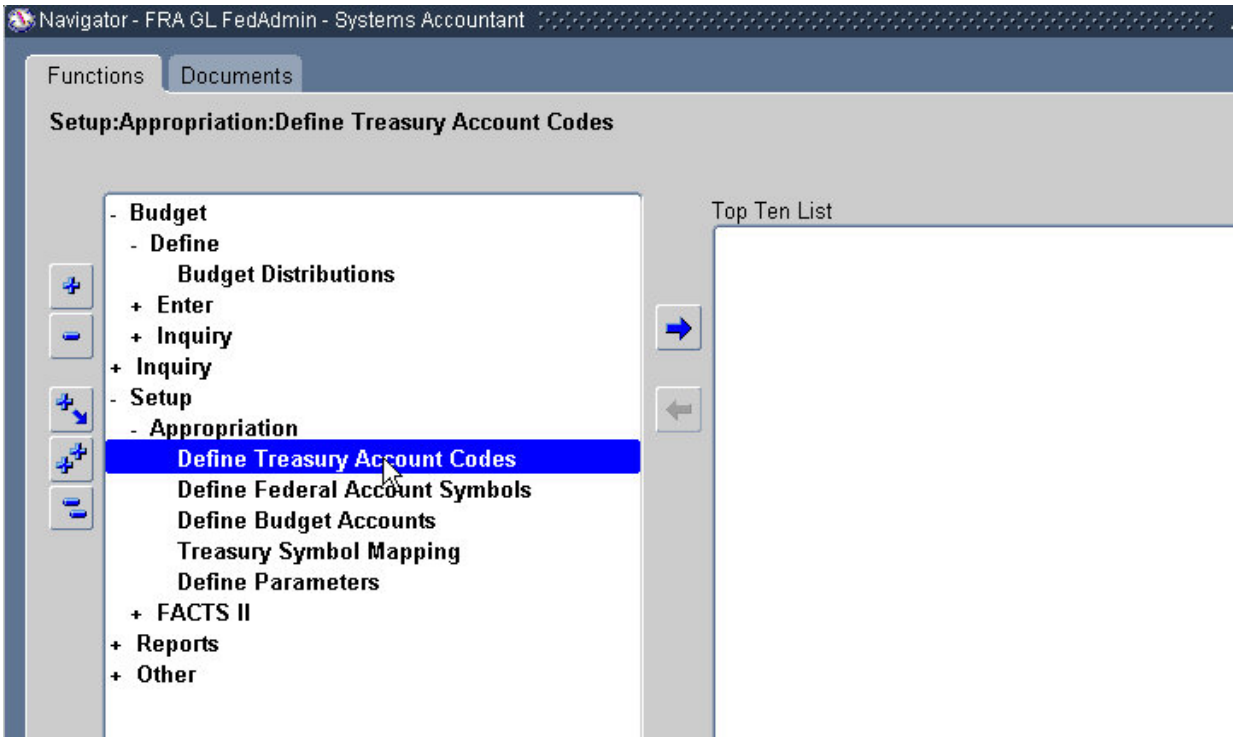
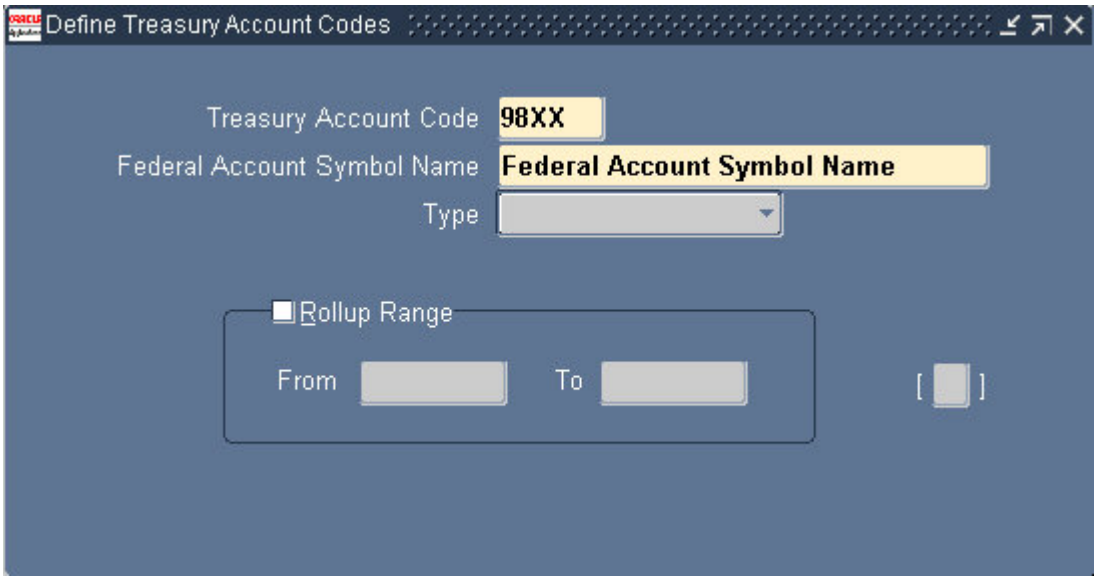
Lab 1 Solutions: Entering Data Using Forms

1. Select the FRA GL FedAdmin Systems Accountant responsibility.



2. Select N → Setup → Appropriation → Define Treasury Account Codes



3. Enter a new Treasury Account Code of 98XX where XX is your training terminal number in the Treasury Account Code field.

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Lab 1 Solutions: Entering Data Using Forms

4. Enter the Federal Account Symbol Name as Federal Count Symbol Your Name.

5. Save your work. Select the (I) Save on the toolbar. Write down your Treasury Symbol Name for use later.

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Querying Data Using Forms

Chapter 6

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Section Objectives

At the end of this section, you should be able to:

- Search for existing data in an application using Query mode
- Use the Find window to perform a search
- Include wildcards and query operators in your search criteria
- Review records retrieved from a search

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Searching for Information

Basic Business Needs

In Oracle Applications you can quickly retrieve and review all available information in your database without having to remember the information displayed in the windows, or without having to print lengthy reports to see the data. Instead, you can simply run a search to obtain the information you want, and then review the data online in the same window you used to enter the data.

By using the query function in Oracle Applications, you can satisfy the following information search needs.

- Gain instant, online access to all of your application information. You can find information quickly and easily, without having to use a complex query language.
- Search for a specific record or for a group of records based on criteria you enter. You can retrieve this information directly, without having to review all the information in your application database.

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Basic Business Needs

- Search for information using criteria of different types or lengths, including a single letter, a single word, or a group of characters, or anything else you want to enter.
- Find out how much information is available that matches your search criteria before a search for a single piece of information yields 10,000 responses.

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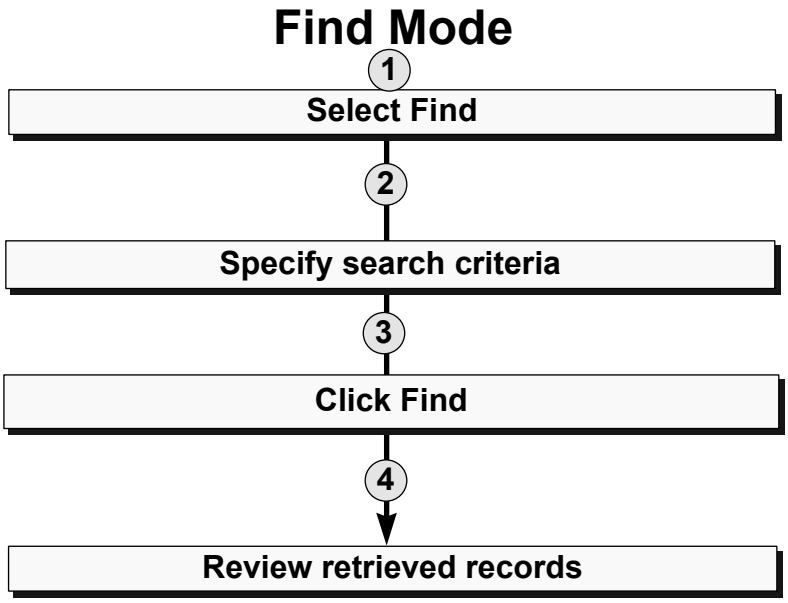

Using Find Mode

To query for records in your current block or window, use the Find window. The Find window contains fields for entering search criteria. These fields are specific to the current block and often validate the search criteria you enter against a list of valid values.

Generally, a Find window is displayed for those blocks that have many records or for those blocks that can be best searched using criteria in more than one field.

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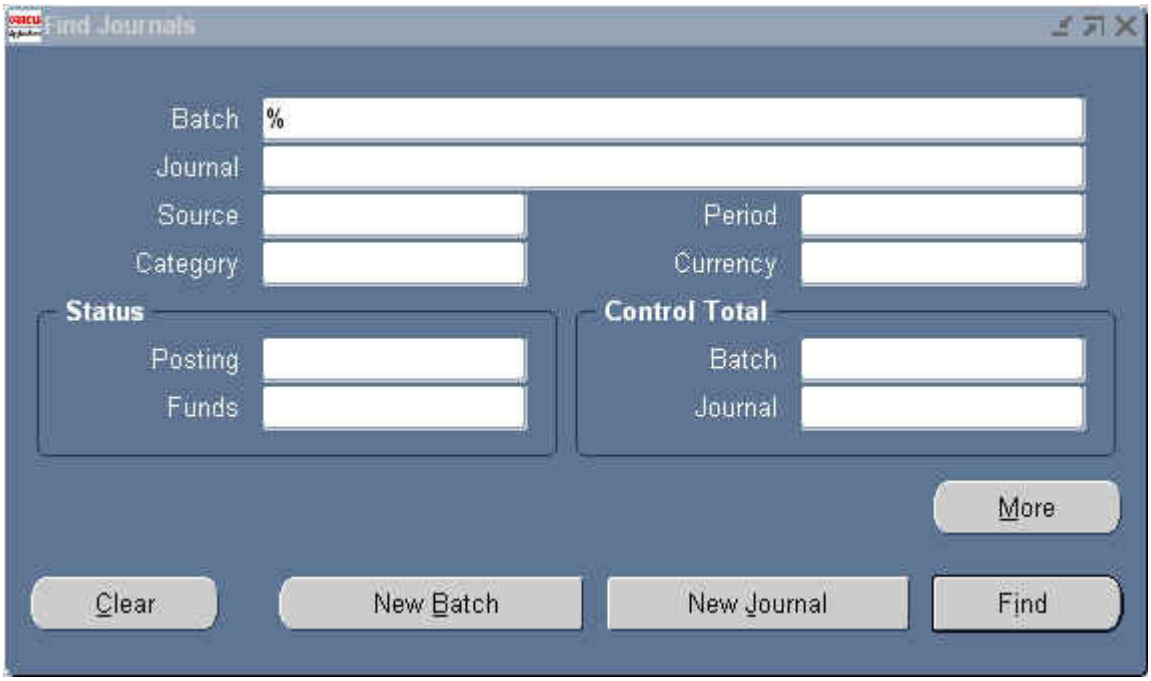
Find Journals

Oracle Applications
N → Journals → Enter
Find Journals

This is an example for using the Find in Oracle General Ledger. All Applications may have a Find screen.



1. Enter your search criteria in the appropriate fields of the Find window.

   - If a field does not provide a list of values for you to choose from, you can enter wildcard characters in the search phrase. You cannot, however, use query operators (such as >, <, and so on) in a Find window.

2. Select (B) Find to find any matching records.

3. Select (B) Clear to clear the current search criteria from the Find window so you can enter new search criteria.

4. Select (B) New to enter a new record in your current block if your search finds no matching records.

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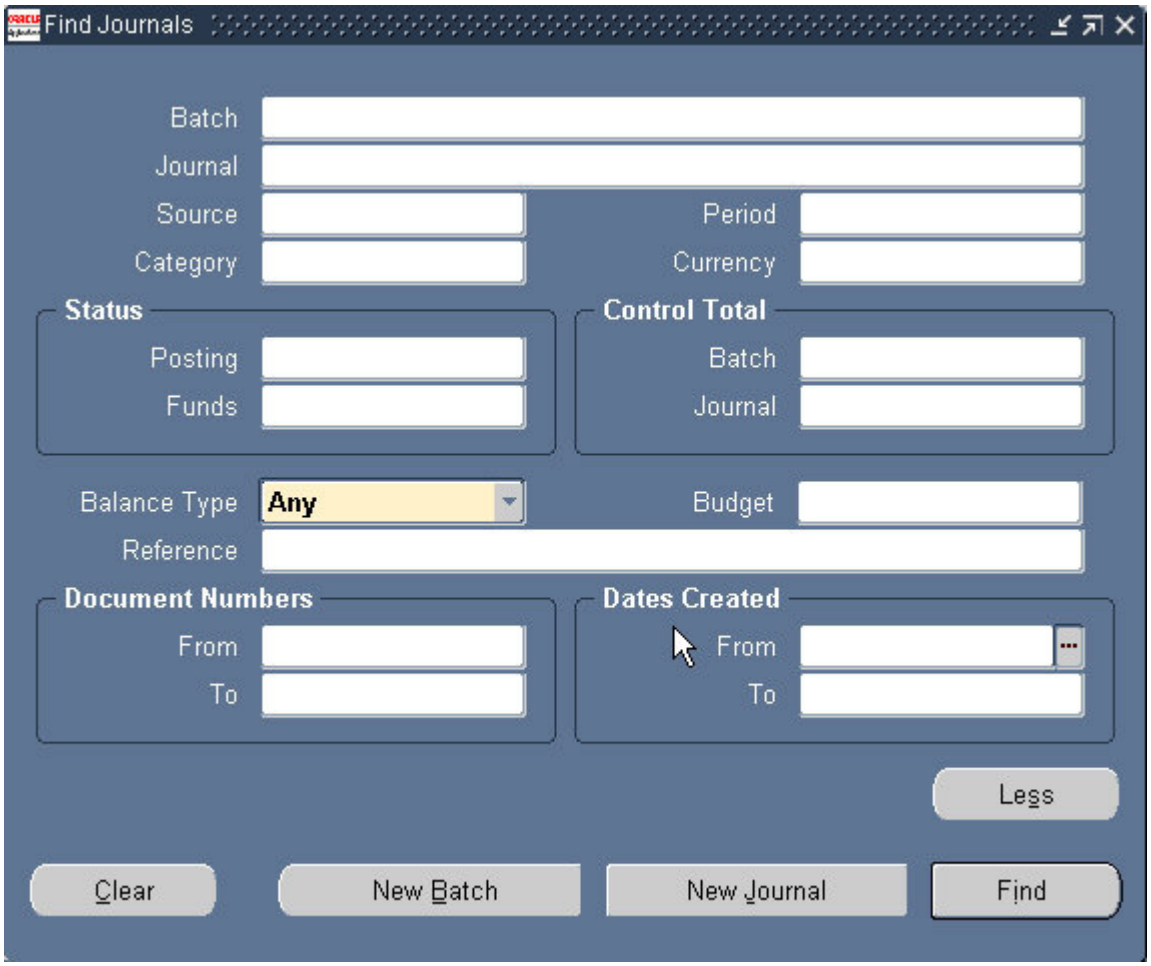
5. Select (B) More to add more fields to the Find window to enter additional search criteria.



6. Alternatively you may navigate to the Find Journals window using your menu toolbar as shown in the example below.

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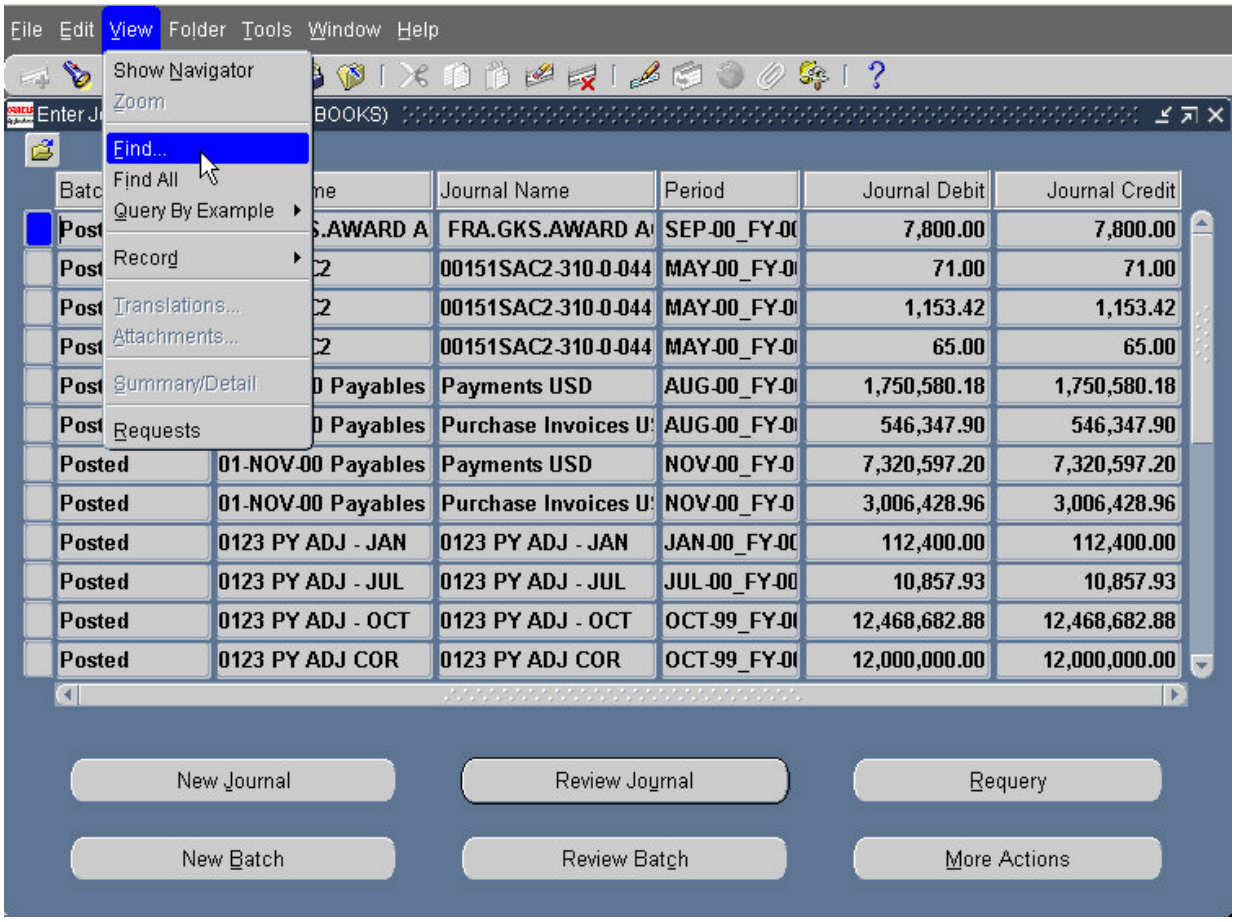

The menu toolbar find option is helpful for additional searches following your initial search. Selecting Find will open the Find Journals window.

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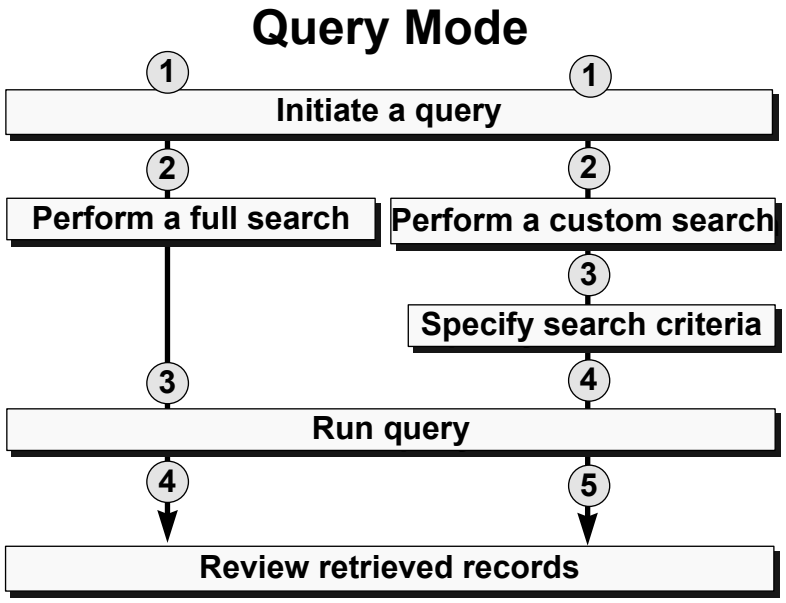

Using Query Mode

To retrieve a group of records based on more sophisticated search criteria than Find mode can achieve, you can use Query mode to specify complex search criteria in most of the fields of your current block. The search criteria can include specific values, phrases containing wildcard characters, and phrases containing query operators to help you pinpoint the data of interest.

In addition, if you do not actually need to retrieve the records in Query mode, but only want to know how many records match your search criteria, you can perform a query count to save yourself time.

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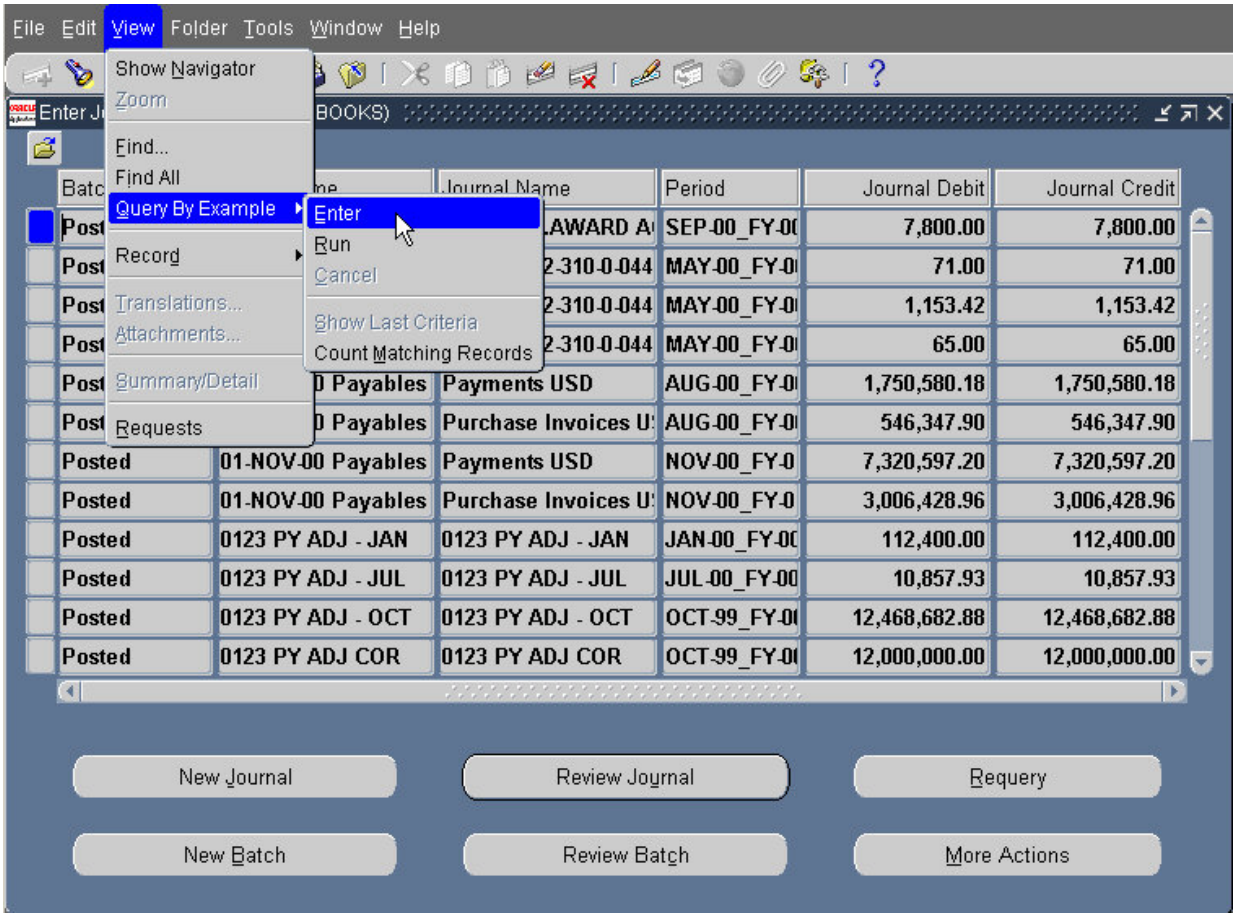
Using the Query Mode

Menubar

Oracle Applications
M → View
Menubar



How to Use Query Mode

1. Select (M) View: Query By Example.

2. Enter search criteria in any of the fields, using wildcard characters and query operators as necessary. You can also select (M) Query By Example: Show Last Criteria to display the search criteria used in your last search, if you performed one.

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VIEW MENU	
Menu Item	**Comments**
Show Navigator	Displays the Navigator window.
Zoom	Invokes custom defined zooms.
Find	Displays the Find window to retrieve records.
Find All	Retrieves all records.
Query By Example Dropdown Menu	
Query By Example Enter	Invokes 'Entry Query' mode to enter search criteria by a query-by-example.
Query By Example Run	Executes the query-by-example.
Query By Example Cancel	Cancels the query-by-example by exiting from 'Example Query' mode.
Query By Example Show Last Criteria	Recovers the search criteria used in the previous query-by-example.
Query By Example Count Matching Records	Counts the number of records that would be retrieved if you ran the current query-by-example.
Record Dropdown Menu	
Record First	Moves the cursor to the first record.
Record Last	Moves the cursor to the last record.
Translations	Displays the Translations window.
Attachments	Displays the Attachments window.
Summary/Detail	Switch between the summary and detail views of a combination block
Requests	Displays the Request window.

3. Select (M) Query By Example: Run to perform the search.

4. Select (M) Query By Example: Cancel to cancel from Enter Query mode.

How to Obtain a Query Count

1. Perform steps 1 and 2 above.

2. Select (M) Query By Example: Count Matching records to display the number of records a Query-By-Example search would retrieve.

Toolbar Find Icon

The flashlight on the toolbar will open the Find window.

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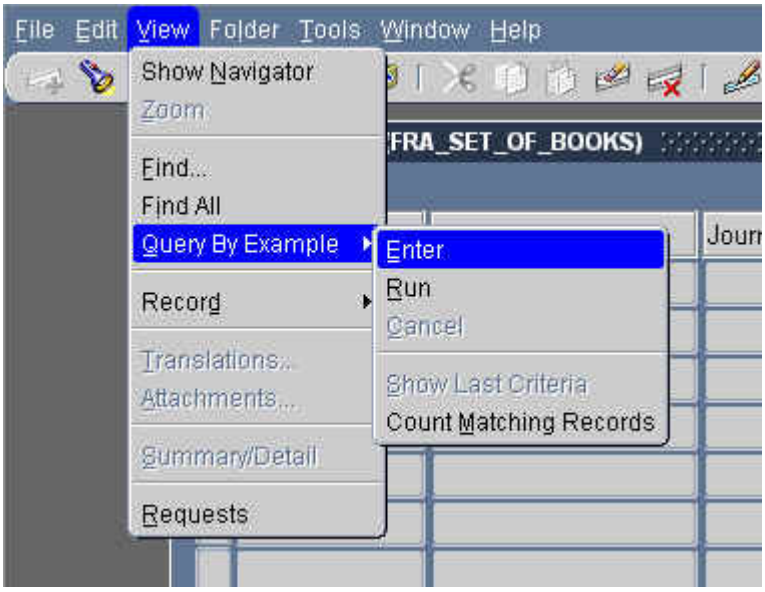
Oracle Applications
M → View → Find All
M → View → Query By Example → Enter → Run
M → View → Find
Toolbar



Using Query Operators

Operator	Meaning	Example
=	Equals	= 'Janet' or 107
!=	Is not	!= 'Bob' or != 109
>	Greater than	>99.1 or > '01-JAN-93'
>=	At least	>=55
<	Less than	<1000.00
<=	At most	<= 100
#BETWEEN	Between two values	#BETWEEN 1 and 1000

Using Wildcard Characters

You can use the percent "%" wildcard character to represent any character or group of characters. For example, use "Manuf%" to represent Manufacturing, Manufacturer, and so on. You can also use the underline "_" character to represent any single character. For example, "Product_" can represent ProductA, or Product1.

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The Difference Between Query Mode and Find Mode

Query Mode

- In Query mode, you can use the menu bar to access a query, or you can use keyboard shortcuts, [F11] to enter a query, and [Ctrl] + [F11] to execute a query.
- You use the existing window to prepare your search criteria for the query. You can enter specific information into any field to narrow your search.
- When using wildcards to prepare your search criteria, you can use all query operators to narrow your search.
- In query mode, you can check to see how many records match your criteria even before retrieving the data that matches your query.

Find Mode

- In Find mode, you use the menu bar to access the Find window, or you click the Flashlight icon from the Toolbar window.
- You use a new window, the Find window, to prepare your search criteria.
- Only specific wildcards are accepted in the Find window; those are determined by your application.
- The Query Count feature is not available in Find mode.

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Searching for Data in a Flexfield

Flexfields

A flexfield is a flexible data field that your organization can customize for your business needs without programming. Oracle Applications uses two types of flexfields:

- Key flexfields
- Descriptive flexfields

The Basic Business Needs for Flexfields

With Oracle Applications flexfields you can satisfy the following business needs:

- Using “intelligent” fields—fields comprising one or more segments, where each segment has both a value and a meaning
- Relying upon your application to validate the values or the combination of values that you enter in intelligent fields
- Changing the structure of an intelligent field depending on data in your application
- Capturing additional information that is not provided by existing fields
- Customizing data fields to meet your business needs without programming
- Querying intelligent fields for specific information

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Key Flexfields

A key flexfield is a field that you can customize to enter multisegment values such as part numbers, account numbers, and so on.

Examples

- P35-297-A (part number)
- 0450-387-3478 (account number)

Using Key Flexfields in Oracle Applications

A *key flexfield* is a field made up of segments, each of which has both a value and a meaning. You can think of a key flexfield as an "intelligent" field that your business can use to store information represented as codes.

Most organization use codes to identify general ledger accounts, part numbers, and other business entities. Each segment in the code represents a characteristic of the entity. A combination of segment values, also known as a *key flexfield code combination*, uniquely describes a business entity stored in a key flexfield. When you change the value of one or more segments in a key flexfield, you change the combination of segment values.

Your organization decides the following information for each key flexfield: (1) how many segments an entity has, (2) what each segment means, (3) what values each segment can have, and (4) what each segment value means. Your organization can also define rules that govern which combination of segment values are valid (cross- validation rules) dependencies among the segments.

A key flexfield looks like any other field in a block. You can simply type the segment values you want into a key flexfield and separate each segment with a character called a *segment separator*. Alternatively, you can open a flexfield window for a key flexfield to display a separate field for each of its segments.

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Descriptive Flexfields

A descriptive flexfield is a field you customize to enter additional information for which your Oracle Applications product has not already provided a field.

Example

- You want to provide an additional field to enter an Internet address for a customer.

Using Descriptive Flexfields in Oracle Applications

A *descriptive flexfield* gives you room to expand your forms, because Oracle Applications cannot predict all the possible information you may want to track. Your organization can use descriptive flexfields to capture additional information that is important and unique to your business.

A descriptive flexfield appears in a block as a two-character, unnamed field enclosed in brackets. If you are viewing data in a table format, the descriptive flexfield will appear at the top of the column as an unnamed field enclosed in brackets.

A descriptive flexfield window is displayed when you move the cursor into a customized descriptive flexfield. Your organization's implementation team can customize a descriptive flexfield to include as many additional fields as your organization needs. These fields, also called *segments*, appear in the descriptive flexfield window.

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Using Flexfields to Enter and Query Data

Number	Type of Flexfield
1	Key flexfield
2	Descriptive flexfield

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Summary

- Query mode
- Find mode
- Query versus Find
- Query operators
- Wildcard characters

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Lab 1: Querying Data Using Forms

1. Use the Query mode to find the "Treasury Account Code" of "1000".
2. Use the Query mode to find all journals beginning with the letter "S".
3. Use the Query mode to determine how many journals have "OCT" in their name.

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Lab 1 Solutions: Querying Data Using Forms

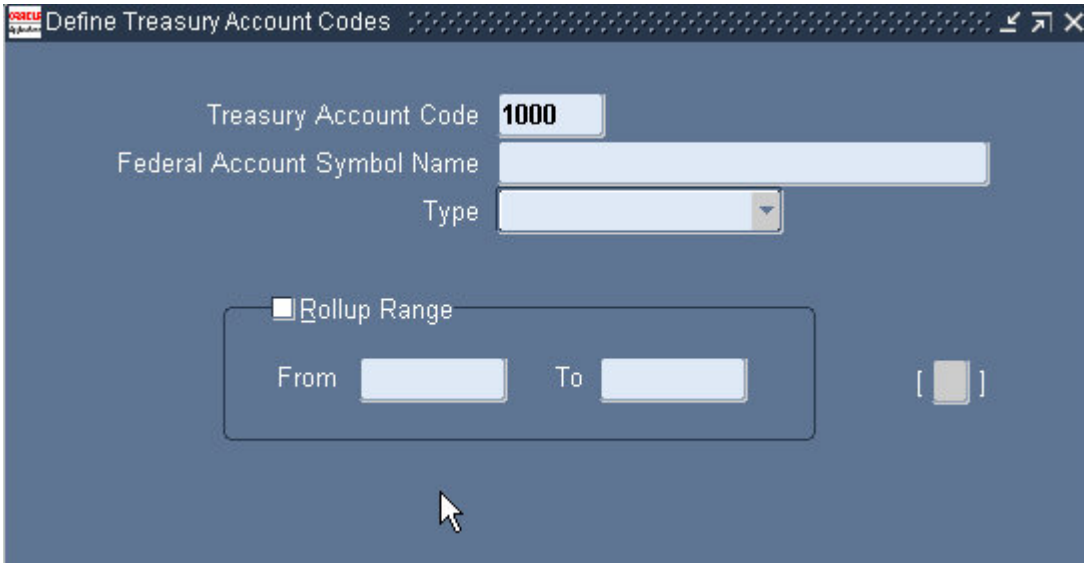
1. Sign on as the FRA GL FedAdmin Systems Accountant responsibility.

   Use the query mode to search for the treasury account code of 1000.

   N → Setup → Appropriation → Define Treasury Account Codes

   Select (M) View: Query by Example: Enter

   If query mode is on, the fields which can be queried will change to the color of blue. In the Treasury Account Code field enter "1000".



   Select (M) View: Query by Example: Run

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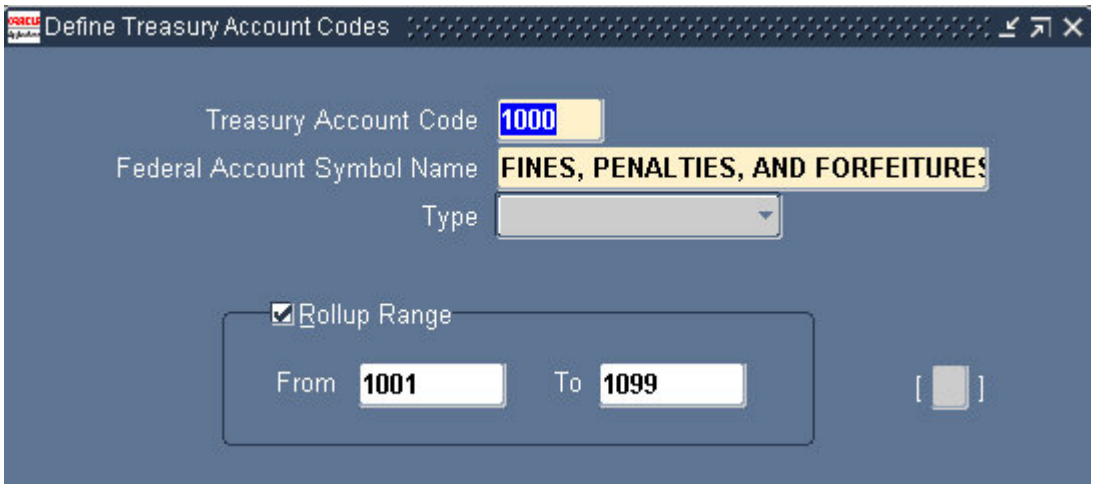

You should see your specific record displayed in the window. You may repeat these steps and search for the treasury account code you saved previously.

2. Log on again as FRA GL Systems Accountant and use query mode to search for all journals with a journal name beginning with S.

   N → Journals → Enter

   The Find Journals window will open. Close the Find Journal window to use the query mode.

   Verify that your window appears similar to the one displayed below.

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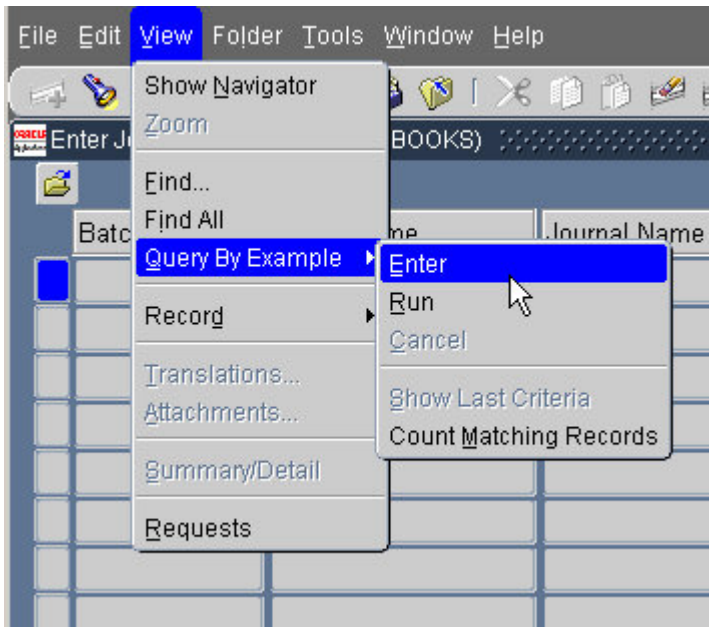
Select File → Query by Example → Enter from the menu in the Toolbar window.



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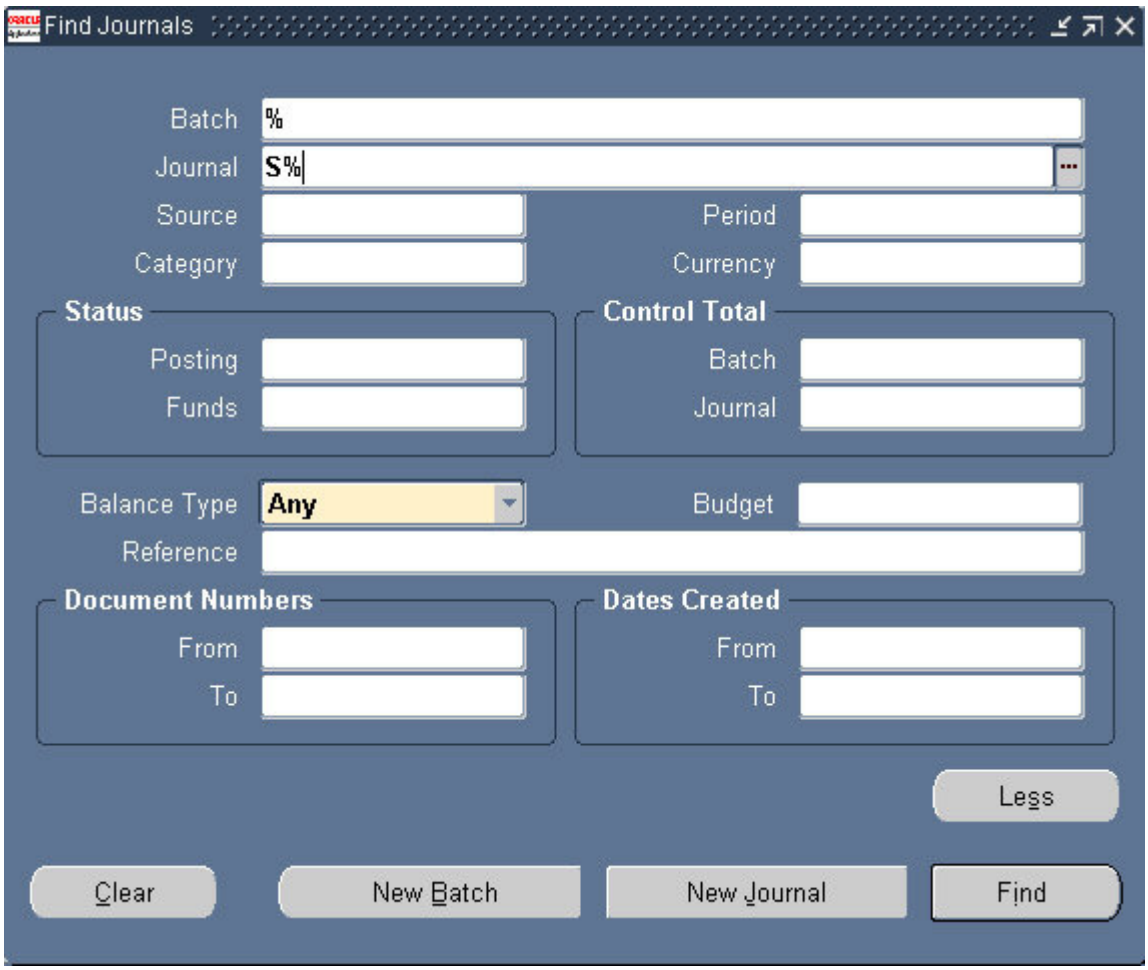
Verify that your window appears similar to the one below.



Type S% in the Journal field to specify your search criteria.

Select M → View → Query by Example → Run from the menu in the Toolbar window.

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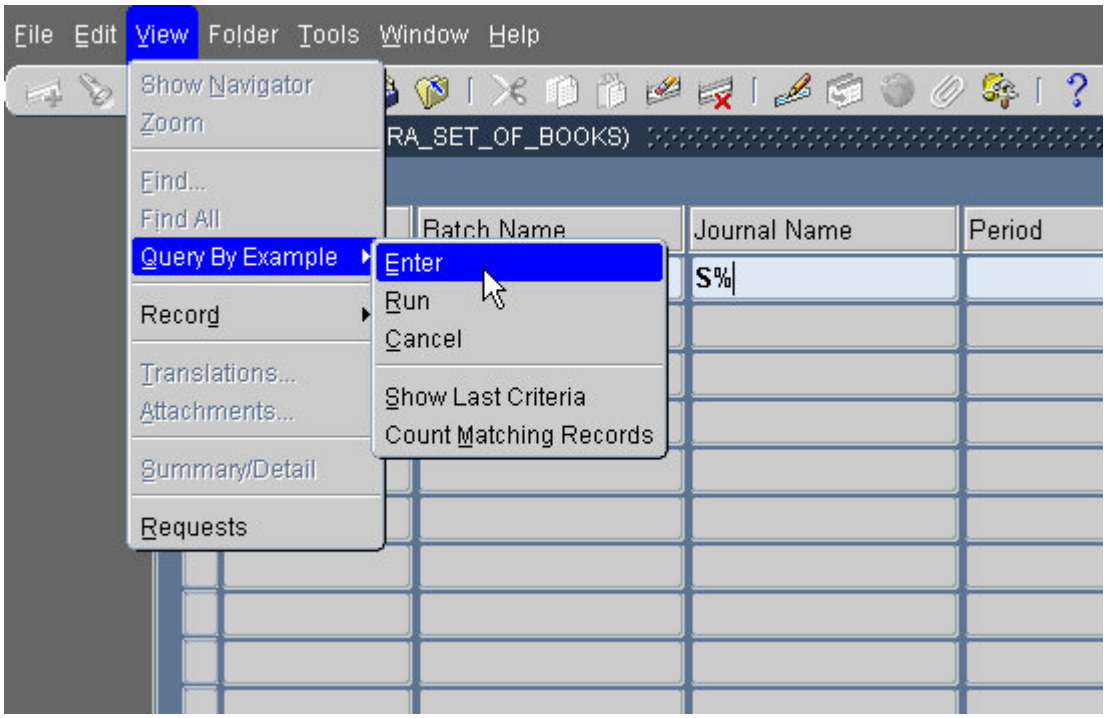

Verify that your window appears similar to the one displayed below.

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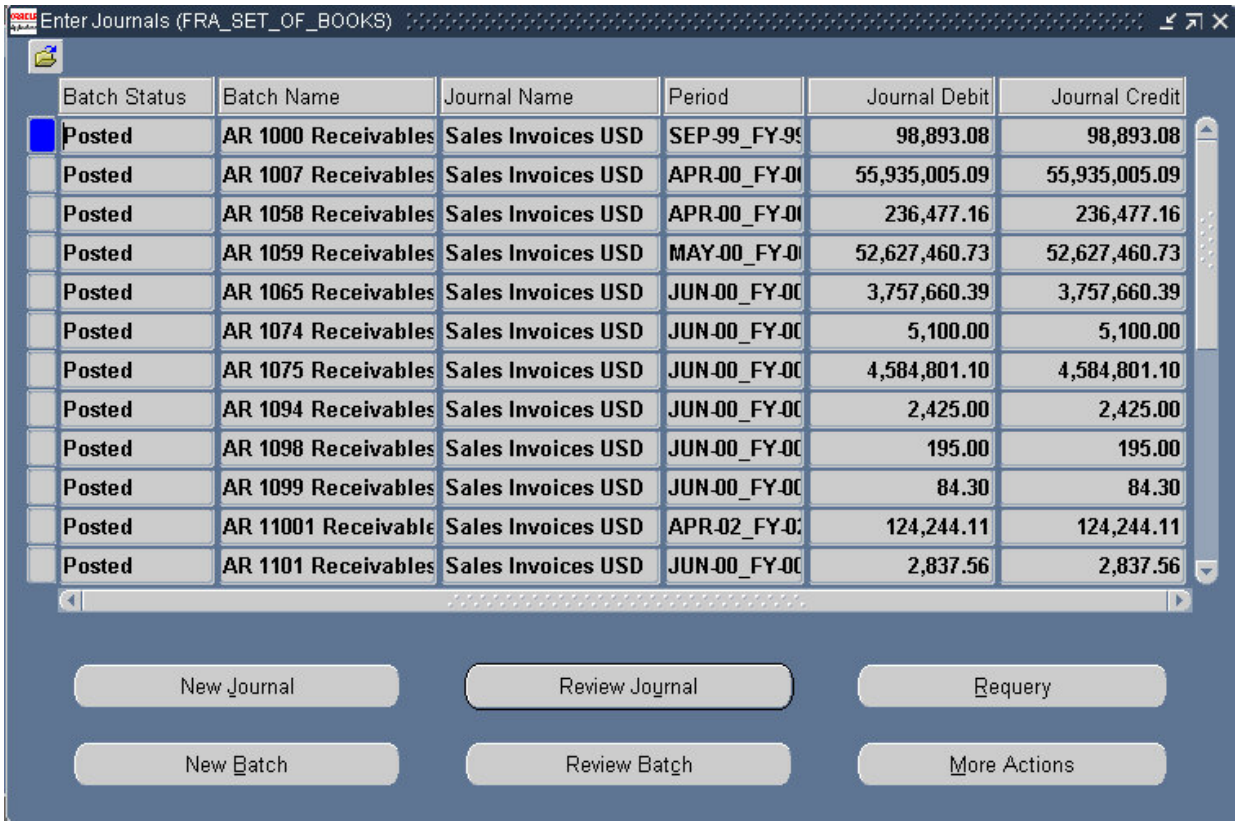

Review the results of your query.

3. Use Query mode to determine how many customers have the letters "OCT" somewhere in their name.

   Select File → Query by Example → Enter from the menu in the Toolbar window. This will clear the Summary form of data from your last query.

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Type %OCT% in the Journal field to specify your search criteria.

Verify that your window appears similar to the one displayed below.

Select View → Query by Example → Run

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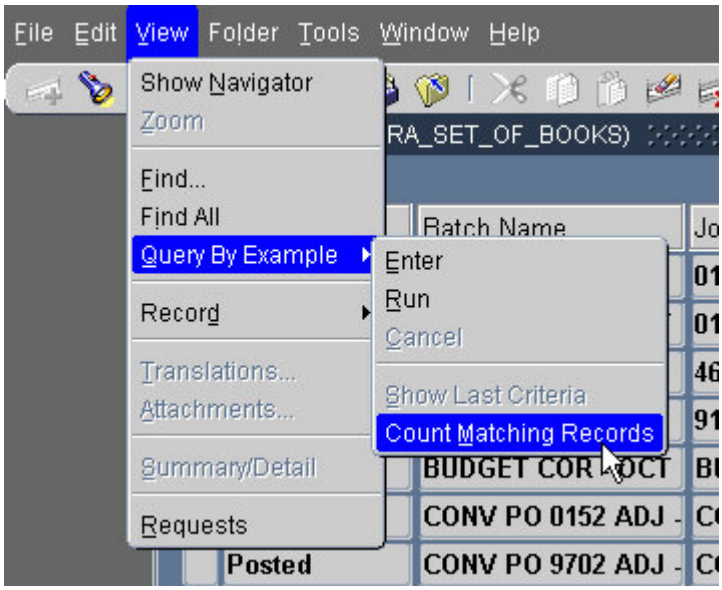
Select View → Query by Example → Count Matching Records from the menu in the Toolbar window.

Verify that your window appears similar to the one displayed below.



Expand the Toolbar window to view the status line for information about this query.

Verify that your window appears similar to the one displayed below.

Note that you did not have to actually run the query in order to view this information.

To exit the query mode and close the Form, select (M) View → Query by Example → Cancel or F4 to cancel Query mode.

Return to the navigator.

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Setting Personal Profile Options

Chapter 7

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Setting Personal Profile Options

Section Objectives

At the end of this section, you should be able to:

- View user profile options that are common to all Oracle Applications
- Change your profile options to customize your default preferences

Setting Profile Options

Through profile options, you can control the behavior of certain Oracle Applications features. This section explains the levels of profile options and how you can change them to suit your personal business requirements.

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User Profiles

Overview of User Profiles

A *user profile* is a collection of changeable options that affect the way your applications run. Oracle Applications establishes a value for each option in a user's profile when the user logs on or changes responsibility. You can change the value of a user profile option at any time. Oracle Applications provides this and other options so that you can alter the behavior of your applications to suit your own preferences.

Oracle Applications uses a set of user profiles options that are common to all application products. In addition, each application has its own unique set of user profile options.

User profile options can be set at one or more of four levels:

- Site
- Application
- Responsibility
- User

Your system administrator can set default option values at any of these levels.

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User Profile Hierarchy

Oracle Applications treats user profile levels as a hierarchy, where User is the highest level of the hierarchy, followed by Responsibility, Application, and at the lowest level, Site. Higher-level option values override lower-level option values.

Site Level

Site level option values affect the way all applications run at a given installation site. Typically, your system administrator will set this option after installing Oracle Applications at a site.

Application Level

Application level option values affect the way a given application runs.

Responsibility Level

Responsibility level option values affect the way applications run for all users of a given responsibility.

User Level

User level option values affect the way applications run for a given application user.

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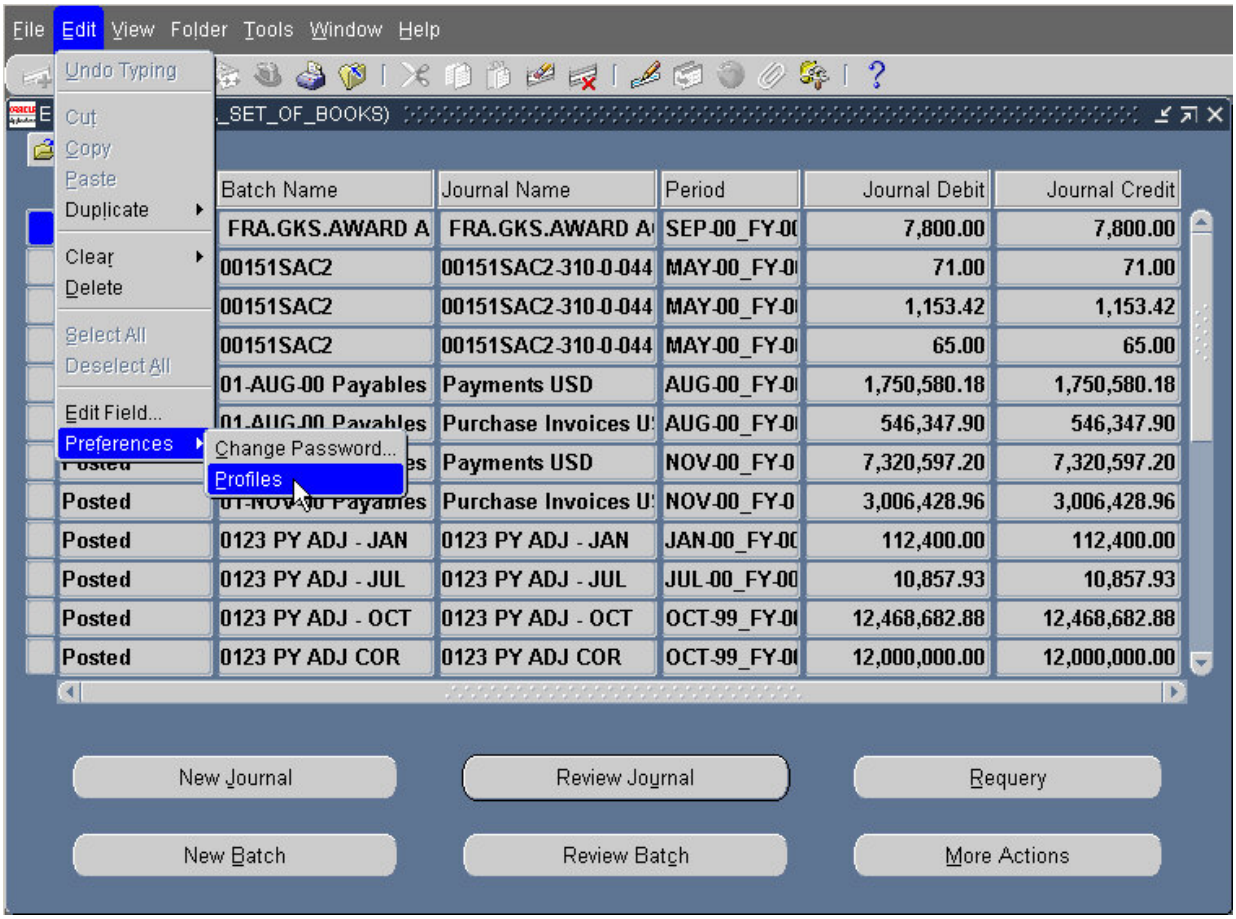
Navigator

Oracle Applications M → Edit → Preferences → Profiles (all responsibilities) Personal Profile Values

Note: Path used depends on the responsibility.



Your Personal User Profile

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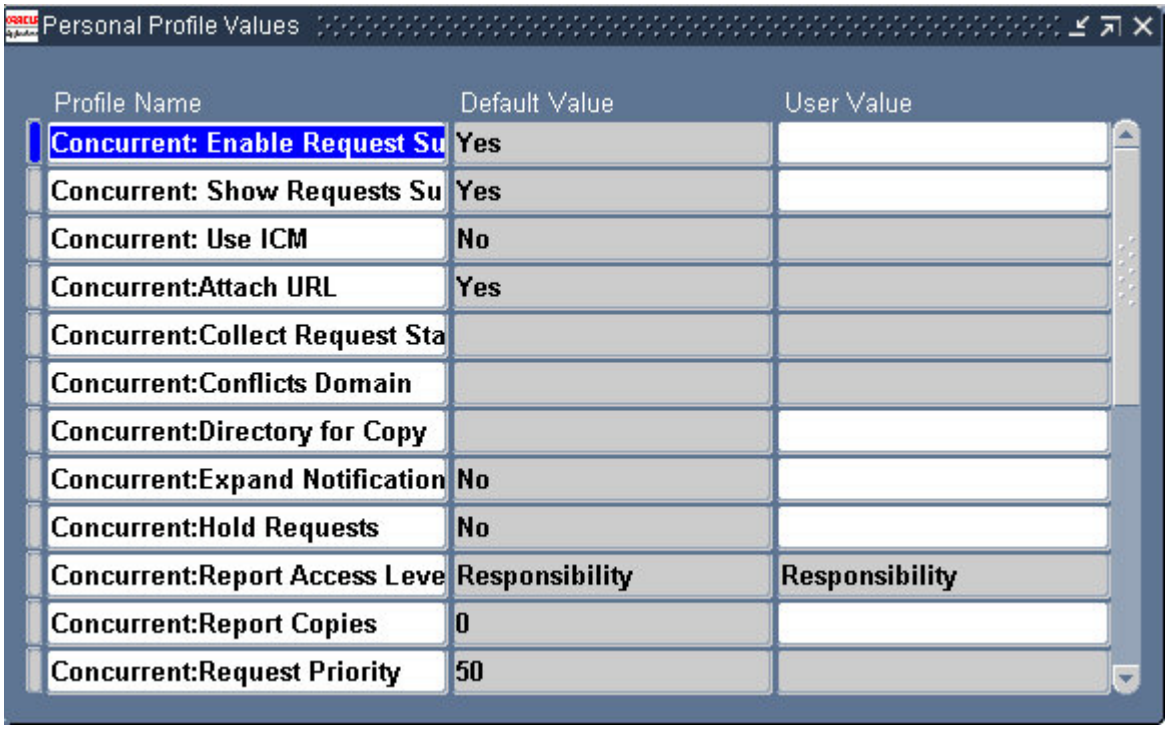

You can change a user profile option value using the Profile Values window, where you can display all your options and review the values your system administrator has set for them.

If you do not set your own user level option values, your user profile options assume the values your system administrator has set for them at the various levels.

How to Change a Profile Option Value

1. Navigate to the Profile Values window. Query the Profile Option you want to change if the Option has been set or choose List to select a Profile Option that has never been set.

2. Move the cursor to the User Value field of the option whose value you want to modify.

3. Enter a new value for the option or if the List icon is displayed, select a value from the list of available values.

   If the profile option is not updateable, the message “Item is protected against update” is displayed on the message line when you try to change the value.

4. Select (M) File: Save.

The Personal Profiles Values Window

All reports and programs in Oracle Application run as concurrent processes whether you submit them using the Submit Requests window or a product-specific submission window. Submitted reports and programs are referred to as *concurrent requests*. Each concurrent request runs according to a set of concurrent processing options.

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The Personal Profiles Values window sets the defaults for these profiles. If you want to change the value of a default, you must change the value of the corresponding user profile option using the Personal Profiles Values window in your application. Below is a subset of profile names and their descriptions.

Profile Name	Description	Required?
Concurrent: Hold Requests	Specifies whether to hold a request temporality, until you remove the hold	No
Concurrent: Report Copies	Specifies the number of copies of a report to print	No
Concurrent: Request Start Time	Specifies the date and time for a request	No
Concurrent: Sequential Requests	Specifies whether to run requests sequentially	No
Concurrent: Save Output	Specifies whether to save report output to a file	No
Printer	Specifies the printer for printing your report output	No
Concurrent: Show Requests Summary After Each Request Submission	You can choose either to have the requests Summary displayed each time you submit a request, or to retain the request submission screen. The default is Yes which means the Requests Summary screen is displayed each time you submit a request. If you choose No, a decision window is opened asking whether to submit another request	No
Viewer: Default Font Size	You can set the default font size used when you display report output in the Report Viewer window	No

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Summary

- Your personal User Profile
- Setting personal User Profile options

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Lab 1: Setting Personal Profile Options

1. Navigate to the Profile Values window. Query any profile options starting with "Concurrent.".

2. Change the report copies profile for the printer.

3. Save your change.

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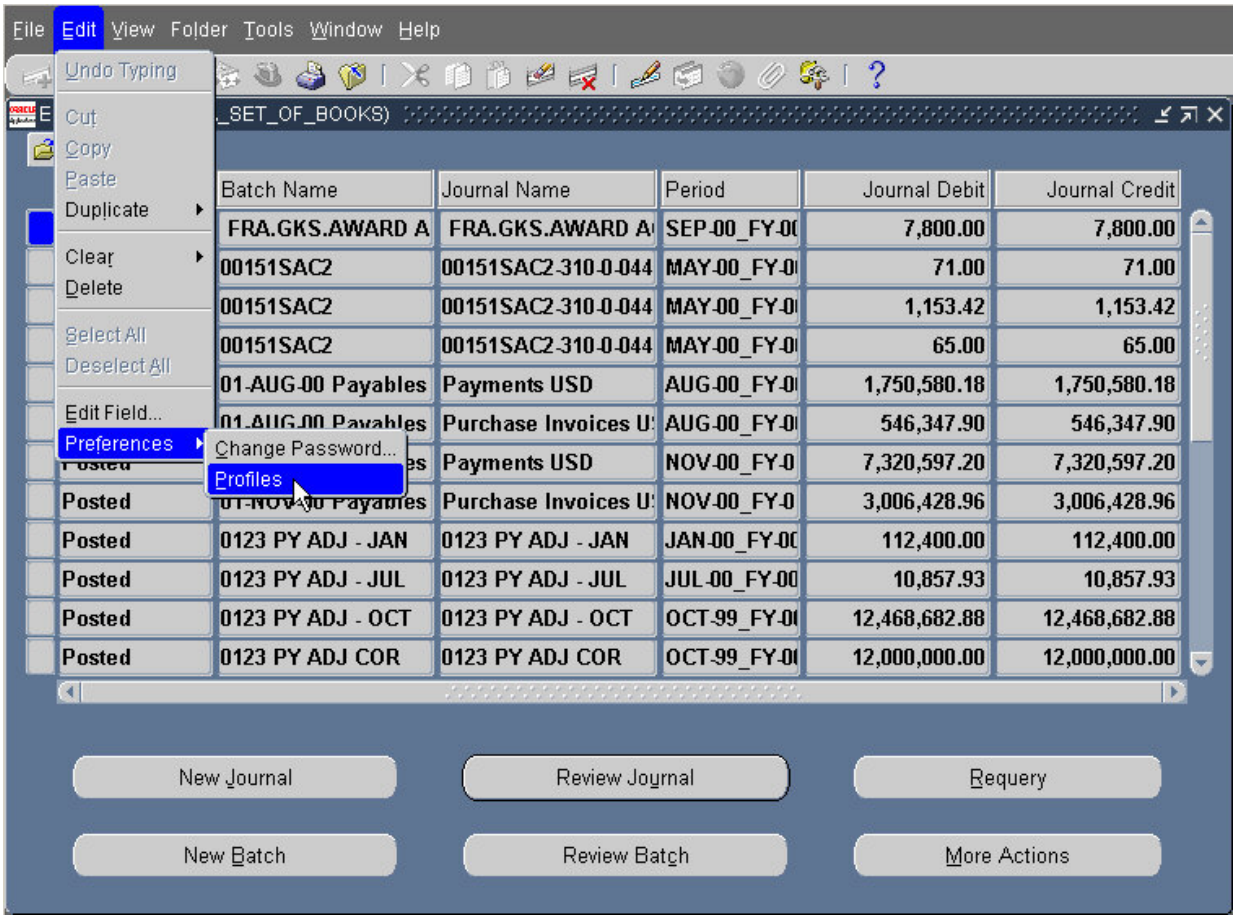
Lab 1 Solutions: Setting Personal Profile Options

1. Navigate to the Profile Values window. Query any profile options starting with "Concurrent.".

   Log on using FRA GL Systems Accountant responsibility.

   Verify that your window appears similar to the one displayed below.



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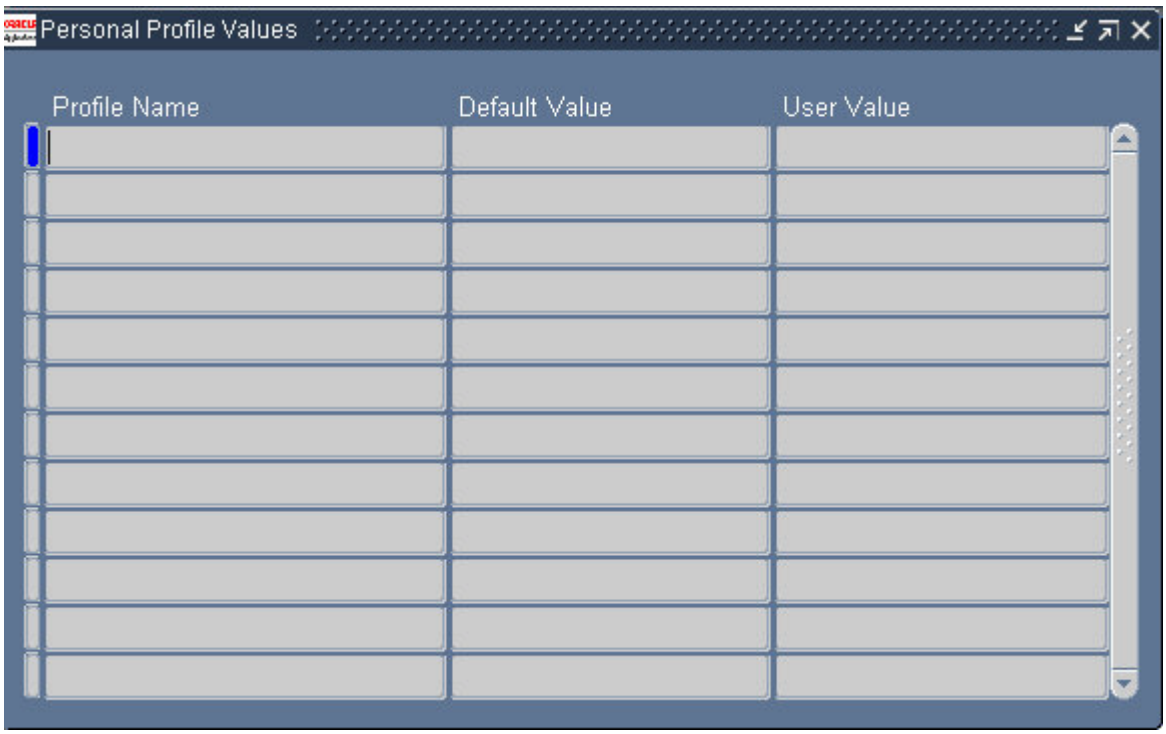
Lab 1 Solutions: Setting Personal Profile Options

Verify that your window appears similar to the one displayed below.



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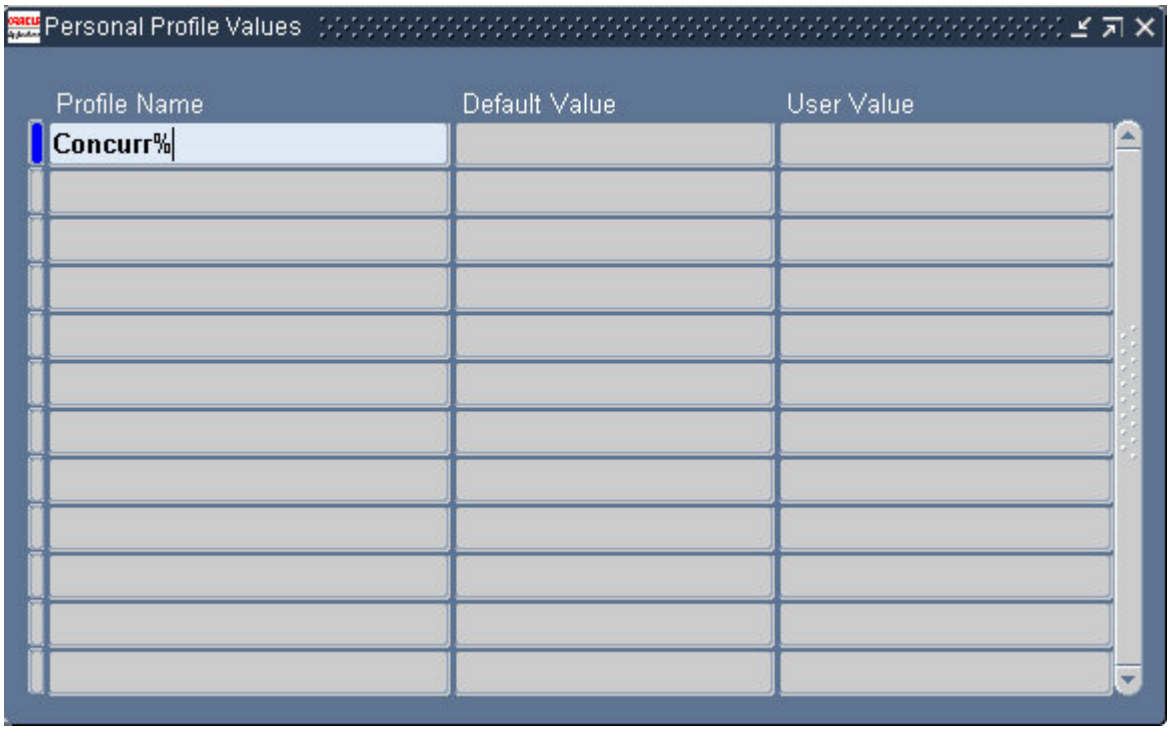
Lab 1 Solutions: Setting Personal Profile Options

Select View → Query by Example → Enter from the Toolbar menu.

In the Profile Name field, type "Concurr."

Verify that your window appears similar to the one displayed below.



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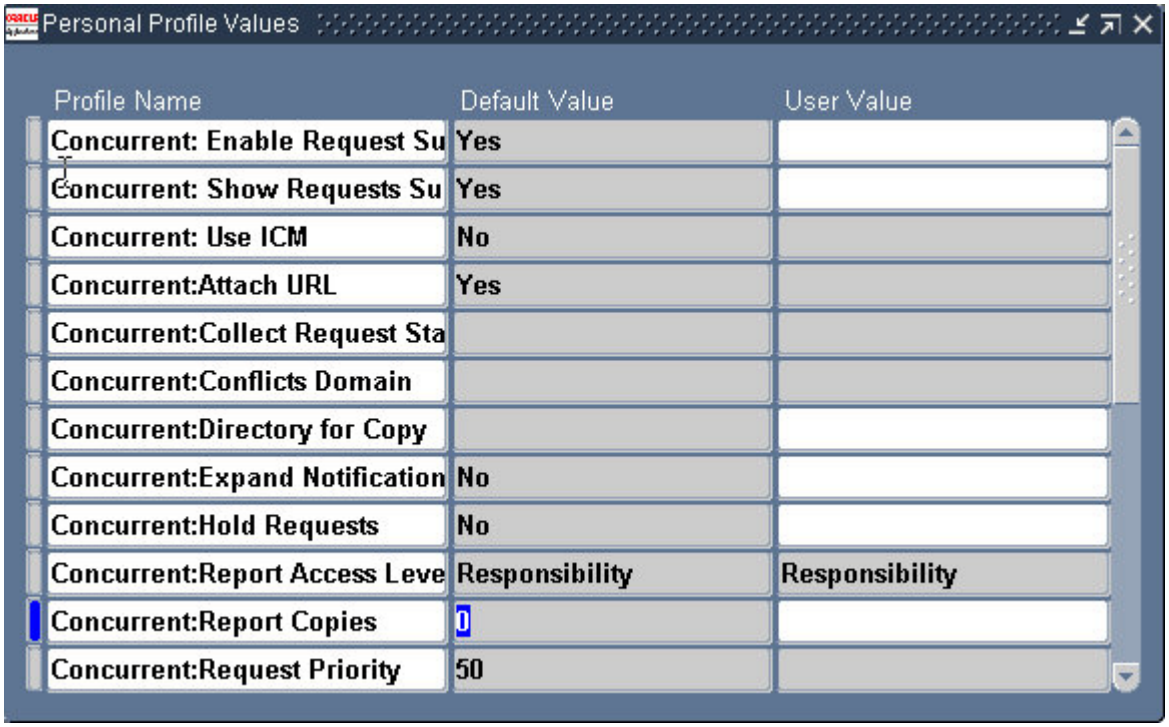
Select View → Query by Example → Run to find all profiles beginning with your search criteria.

Use the down arrow on the left of the window to find the Concurrent: Report Copies option.

Verify that your window appears similar to the one displayed below.



Tab over to the User Value field and enter 2 to change the default from zero to 2.

2. Save your change.

Select File → Save from the Toolbar menu.

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Running Reports and Programs

Chapter 8

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Section Objectives

At the end of this section, you should be able to:

- Discuss the concurrent processing feature
- Submit a report or program
- Copy the report to Excel
- View the progress of a concurrent request
- Cancel or change a request

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Business Needs for Concurrent Processing and Standard Request Submission

Concurrent processing helps you satisfy the following business needs:

- Continue working at your computer while running data-dependent reports and programs.
- Fully use the capacity of your hardware by executing many application tasks at once.

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Using Concurrent Processing

You can run a noninteractive, data-dependent function such as a report or program, simultaneously with online operations. With concurrent processing, you can complete noninteractive tasks without interfering with the interactive work that you perform at your terminal.

An example of concurrent processing occurs when you use the Post Journals window in your Oracle General Ledger application. Once you specify the journal batches to post and click Post, your Oracle General Ledger application uses concurrent processing to post the journal batch entries without further involvement from you. Meanwhile, your terminal is still available for you to continue doing other work in Oracle Applications.

Oracle Applications runs all of its reports and programs as concurrent processes whether you submit them using the Submit Requests window, or using a product- specific submission window. Your system administrator can tailor concurrent processing to optimize the performance of Oracle Applications for you to ensure that your system is not overloaded with processing at any time.

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Using Standard Request Submission (SRS)

Using Standard Request Submission gives you control over how you can run your requests and request sets.

There are three elements involved in submitting a request: selecting the request or request set to be submitted, defining a submission schedule, and providing completion options.

Defining a schedule can be as simple as submitting As Soon as Possible or it can involve using a more complex schedule that you define when you first submit your request and then the schedule may be used for other requests in the future.

Completion options enable you to deliver notification to others using Oracle Workflow, and specify which printers, and how many copies of the output you want to produce for each request.

You can submit as many requests as you like from the Submit Request window. You can even submit a request more than once if you want to run the same request with different parameter values.

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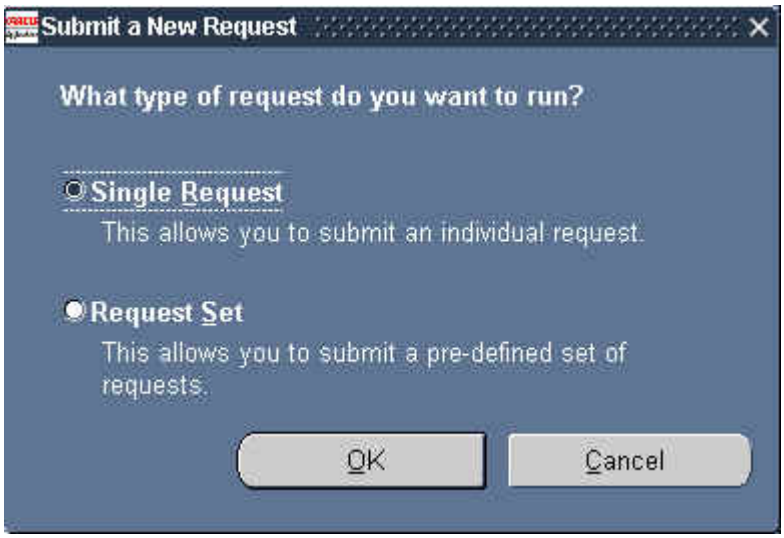
Submit a New Request

Oracle Applications
N → Reports → Requests→ Standard
Submit a New Request

This example is for General ledger. All applications use Requests.



1. Accept the Single Request default and select (B) OK.

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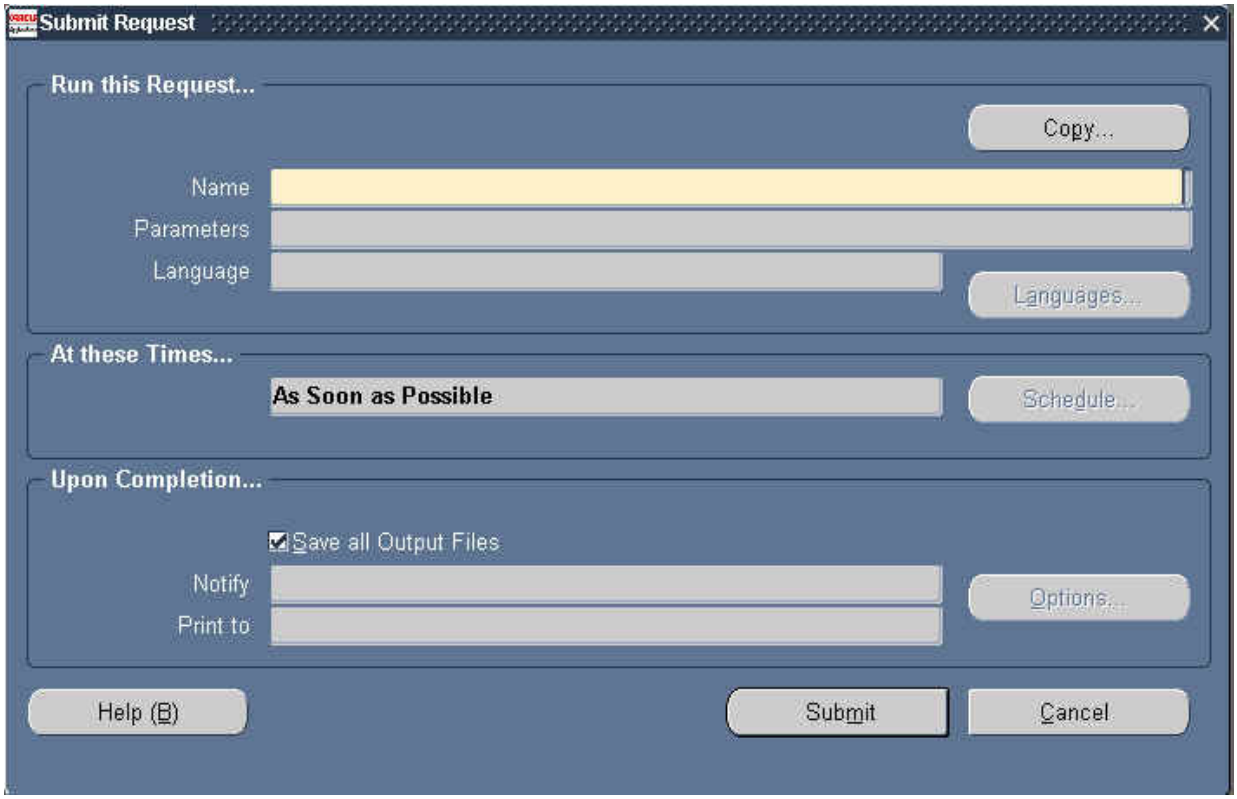
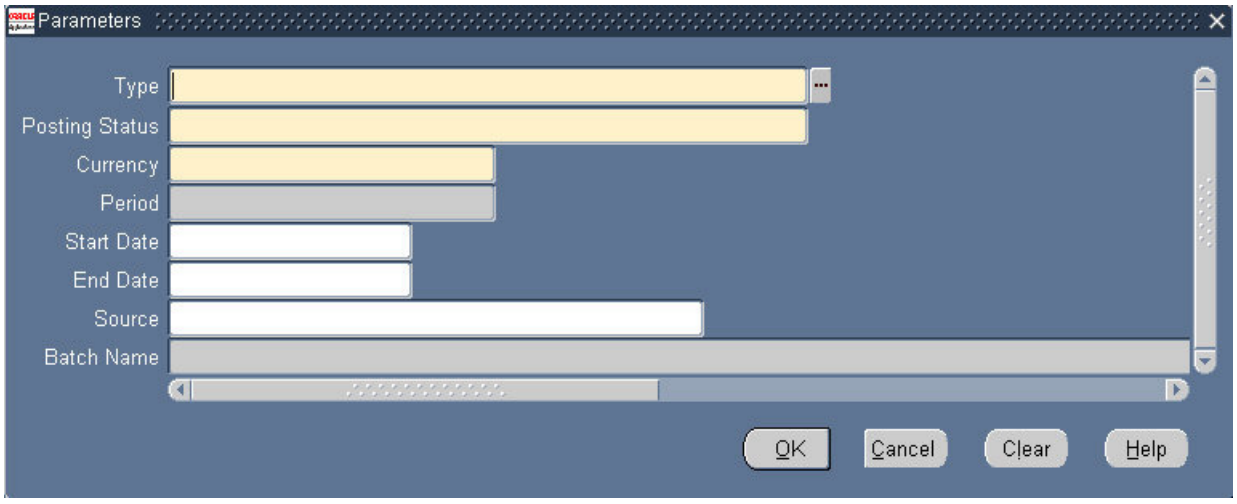


To Submit a Request

2. Use the (B) Copy to take advantage of previously entered request submissions. Or, select the Name of the request (report or program) that you want to run from the list of available requests. Note that the responsibility you are using determines the request group and the requests that will appear in the list.



3. A Parameters window automatically appears if you select a request that requires parameter values. The prompts in the Parameters window are specific to the request that you select.

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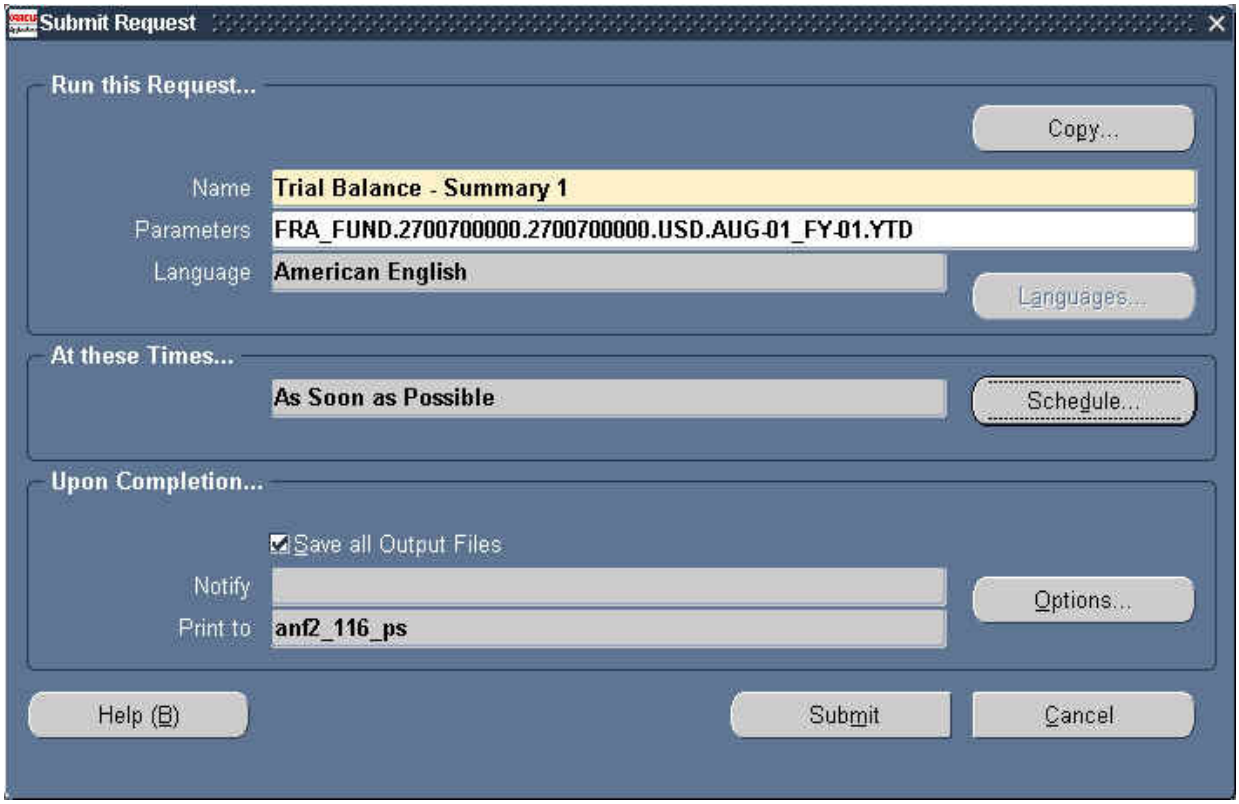
4. Enter the values in the required parameter fields and select (B) OK. The Parameters window closes, and your parameter values are concatenated and displayed in the Parameters field.



5. Select (B) Schedule in the At These Times area.

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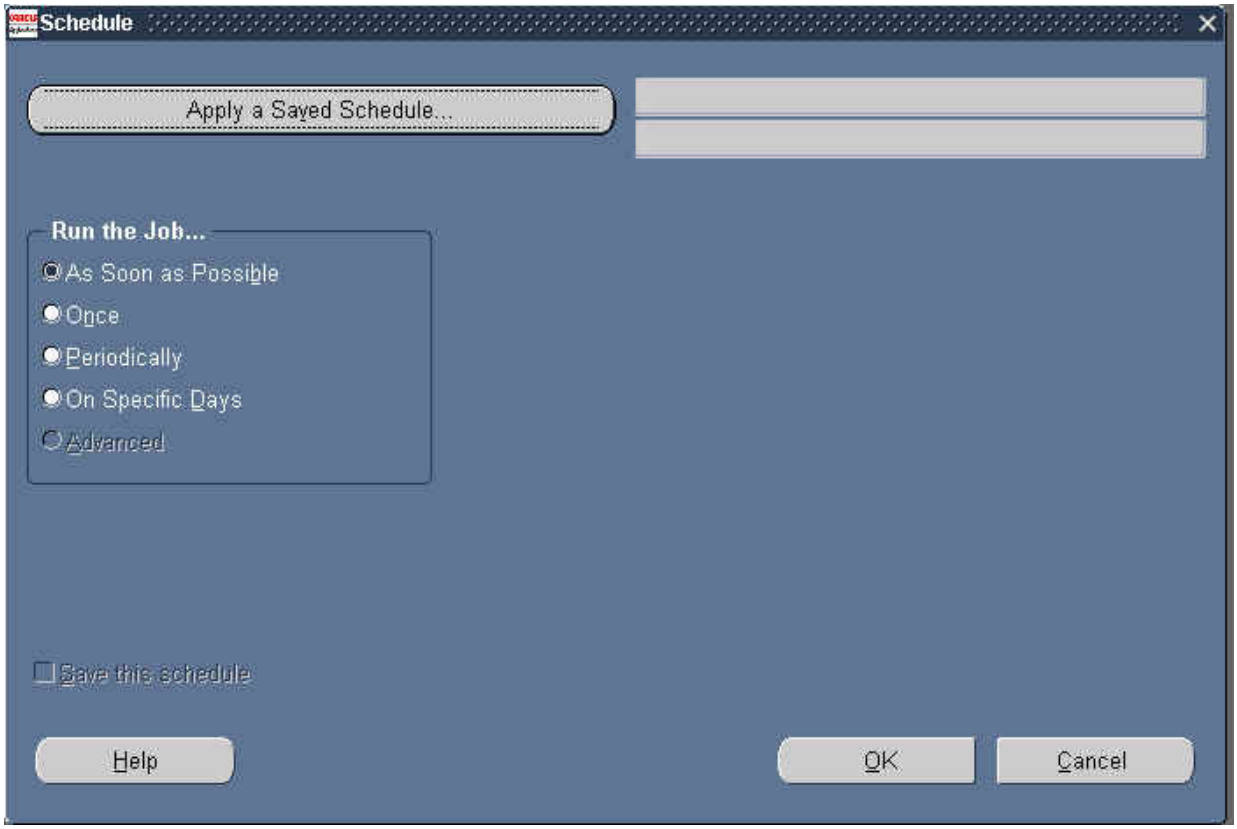

The scheduling window provides you with several scheduling options. You can choose to re-use a schedule you previously defined and saved, or define a new schedule. You can define your schedule to run a request as soon as possible, at a specific time, or repeatedly at specific intervals, on specific days of the week or month.

6. Choose a type of schedule in the Run the Job area.

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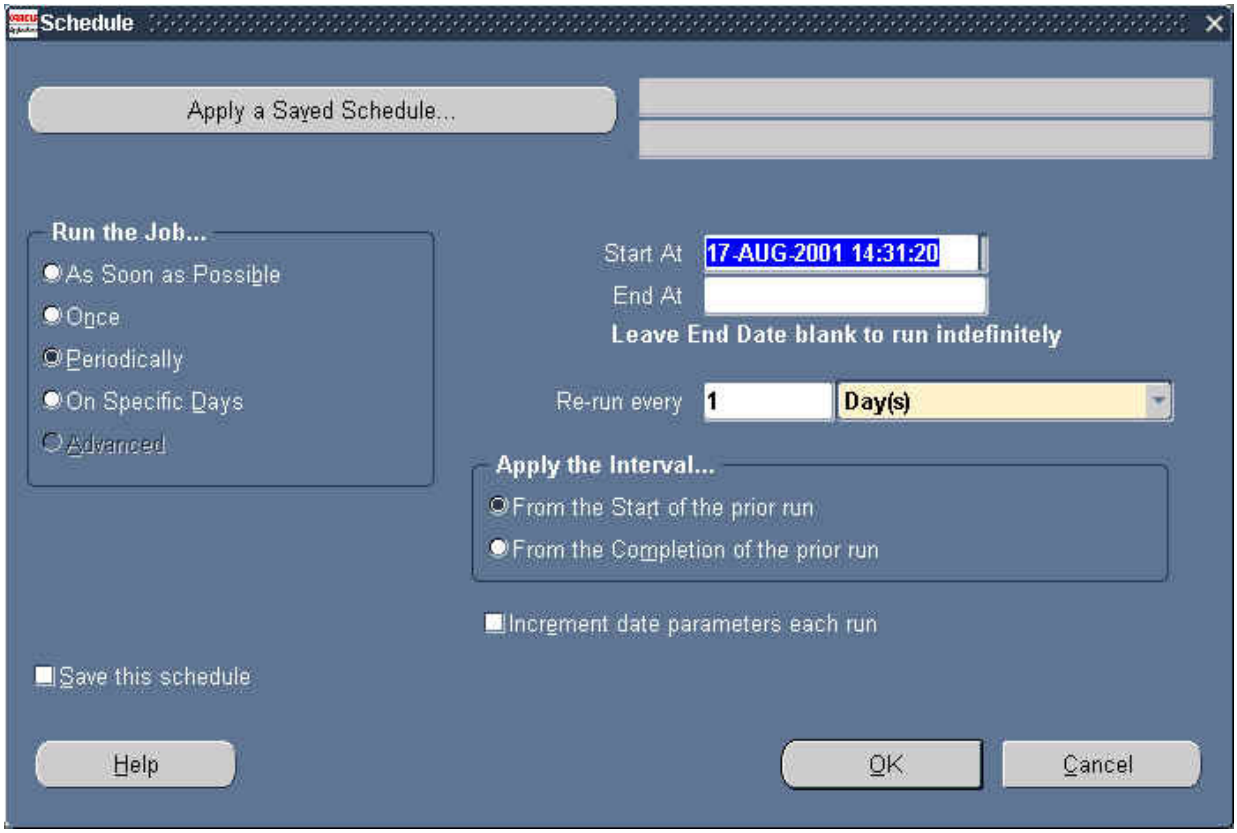
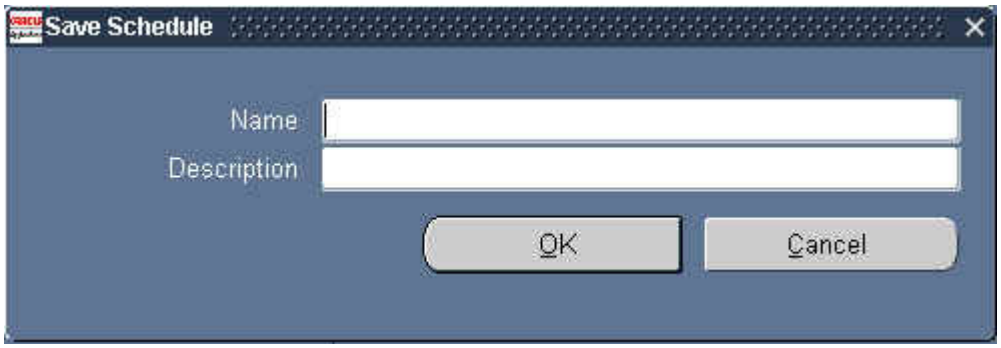


To save your schedule, select the “Save this schedule" check box. You must also provide a unique name for each schedule you save, and you can provide additional information in the Description field.



7. Select (B) OK.

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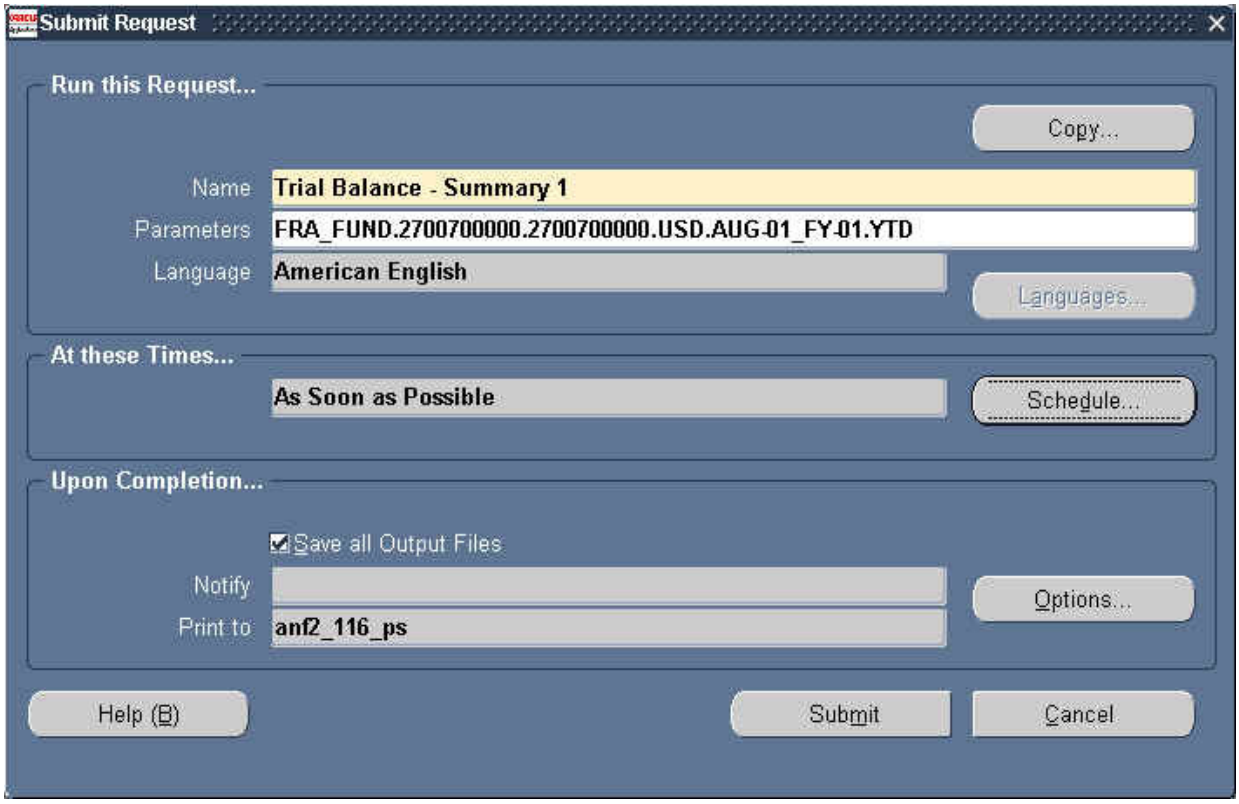

8. On the Submit Request screen in the Upon Completion area, verify the Save all Output Files box is checked to write your request to a file. If you want to view your report online, you must use this check box.

9. Select (B) Options.

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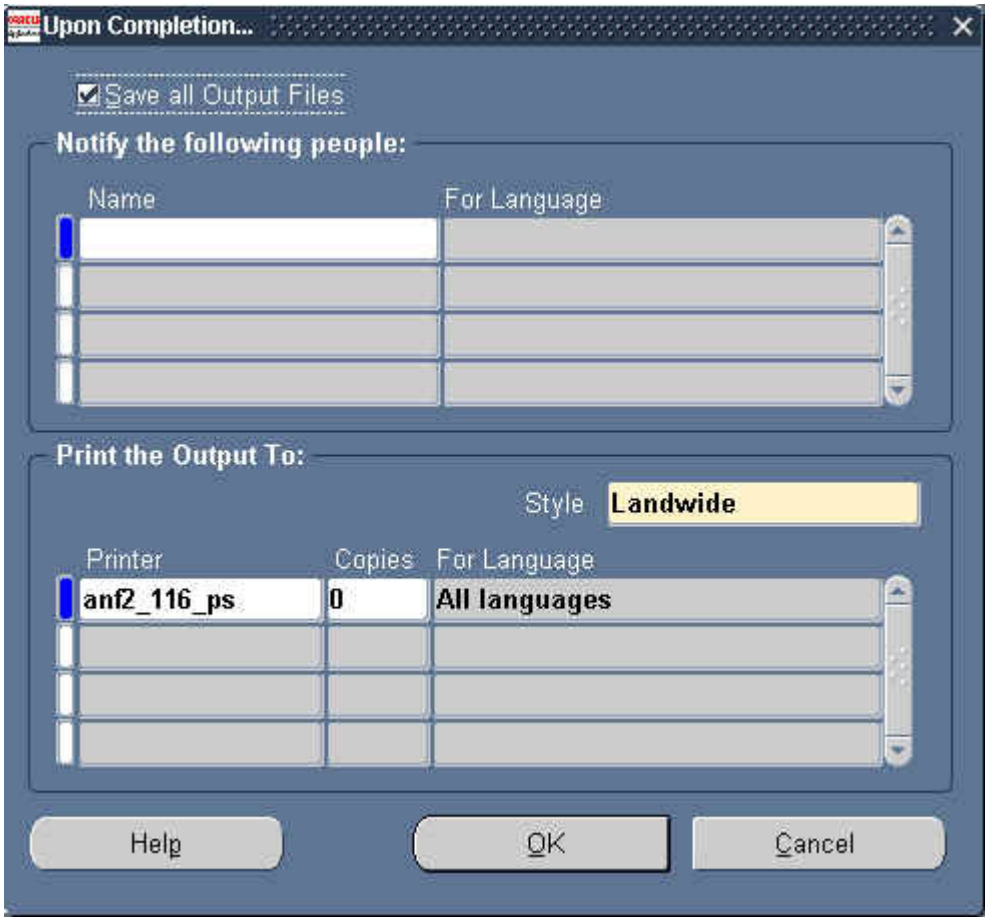

10. Specify additional people to notify using Oracle Workflow, upon completion of this report.

11. Select a print style.

    Note: If the report is not page breaking correctly select a print style with fewer lines per page.

12. In the Printer field, use the LOV to select the printers you want used to produce a hardcopy of your report.

13. Select (B) OK.

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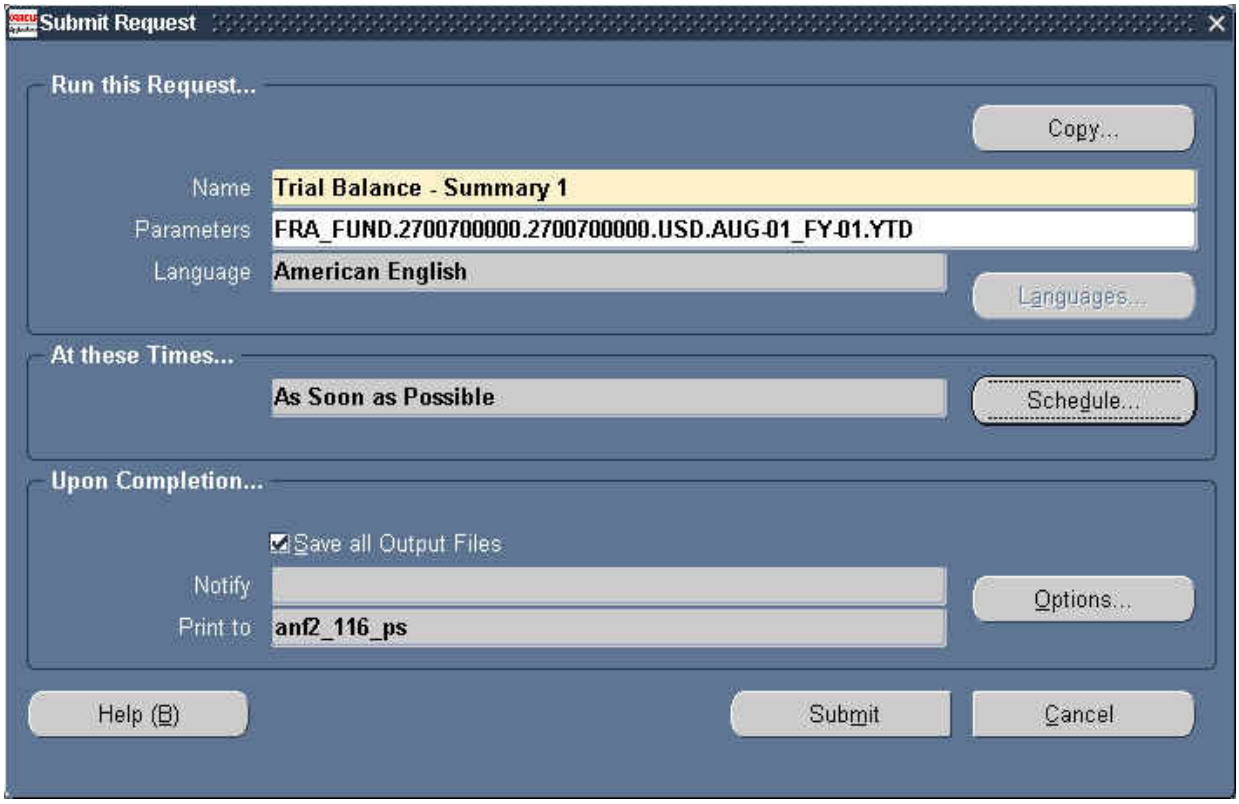

14. Select (B) Submit when you are finished specifying scheduling and completion options.

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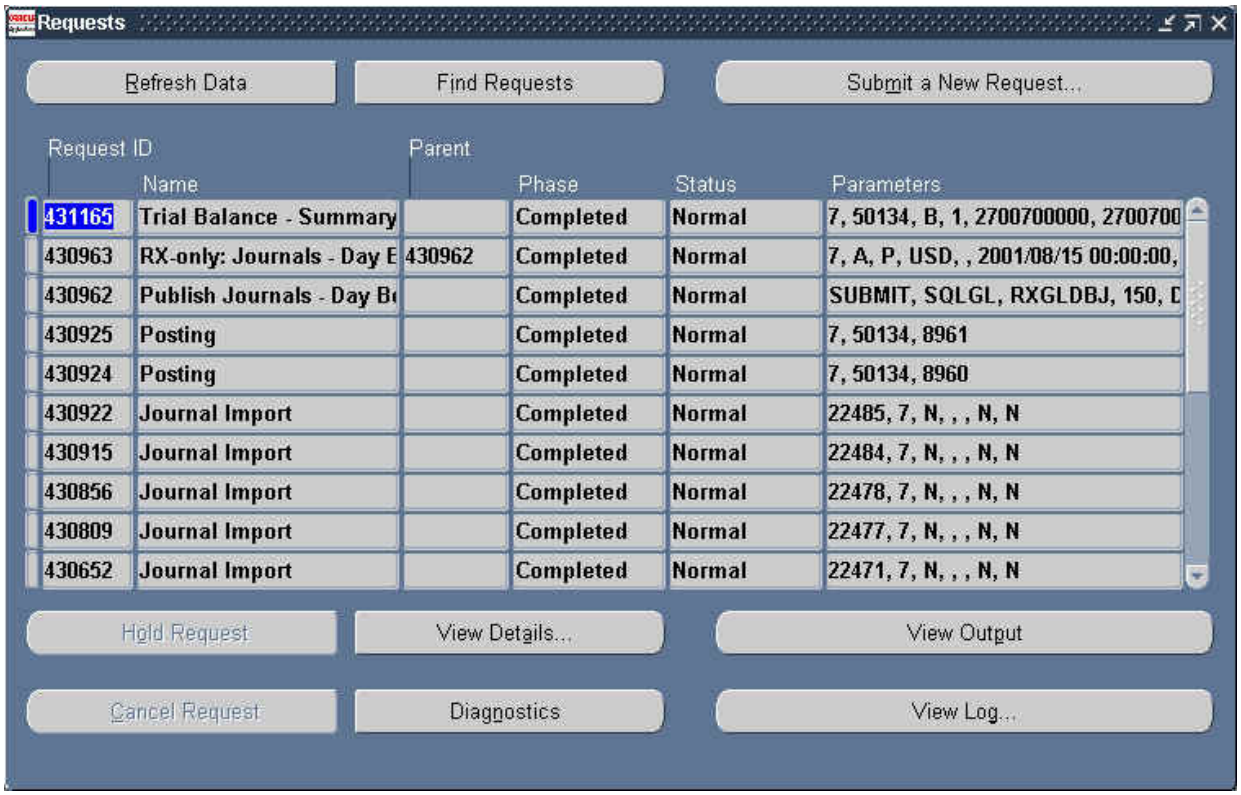
Oracle Applications assigns a request ID to each request submission so that you can identify the results of the request when it is complete.

15. Select (B) Refresh Data. You can use the request ID to monitor your request output in the Concurrent Requests window. Oracle Applications also assigns a new request ID number to each resubmission of a request and displays the request ID in the log file of the previous request.

    When the request completes without error, the Phase field will change from Pending to Completed.



16. Select (B) View Output.

    Font style may be changed to view the report by selecting a different font size from the font size LOV.

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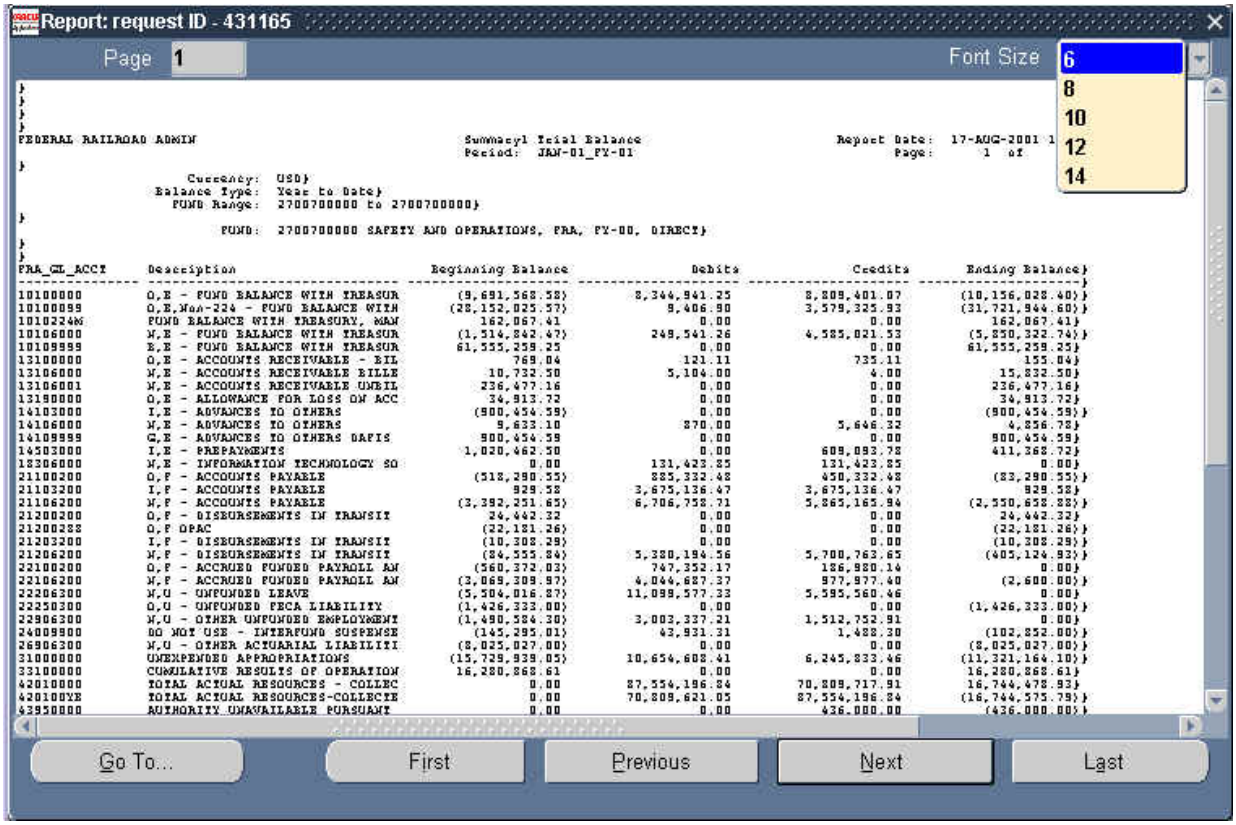

Scroll through the report by using the Scroll bars and buttons at the bottom of the screen.

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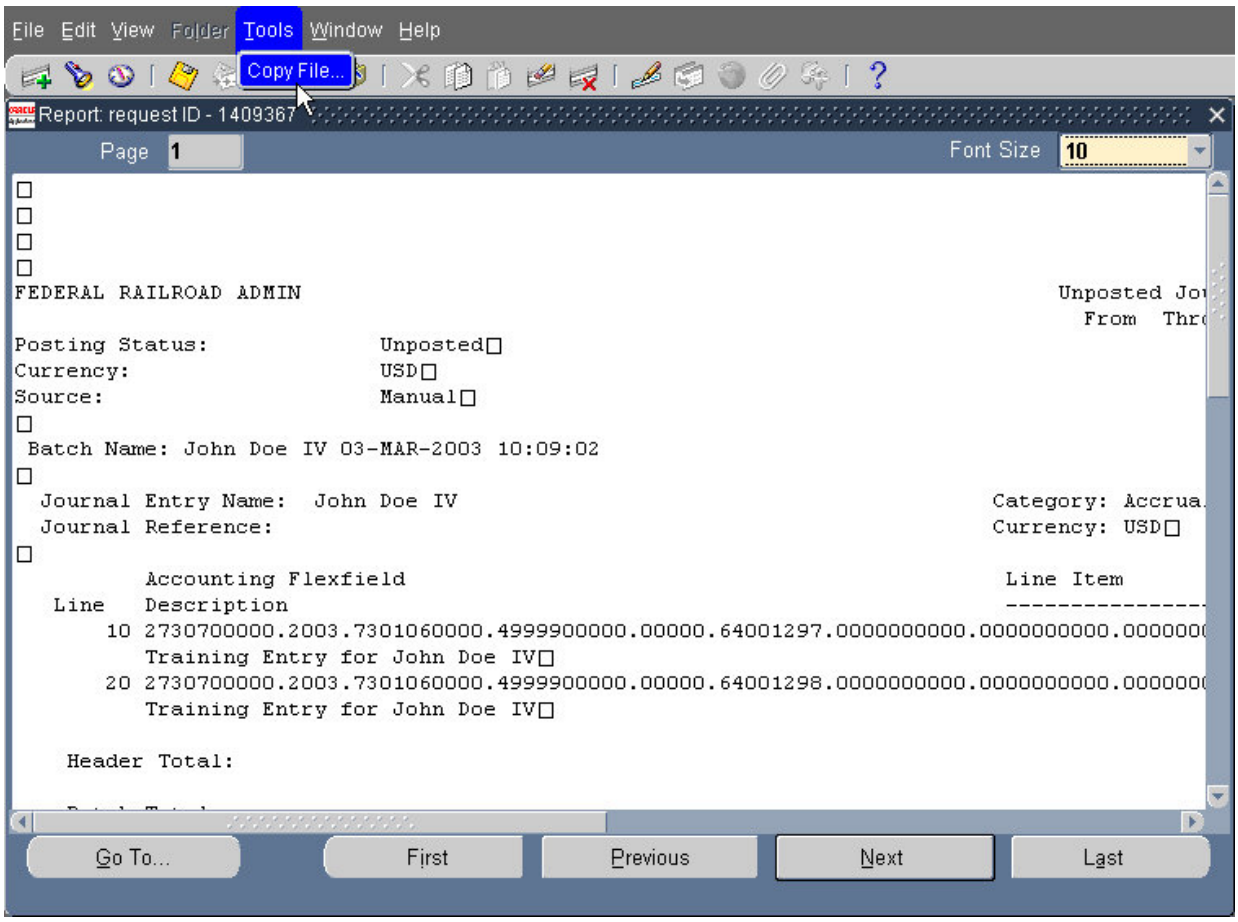
Copying a Report

Complete navigation found in *Submitting a Request*

After viewing the output by selecting (B) View Output on the Requests window, you may copy the report to Excel.

Oracle Applications
M → Tools → Copyfile
Viewer Option



The Viewer option window will open.

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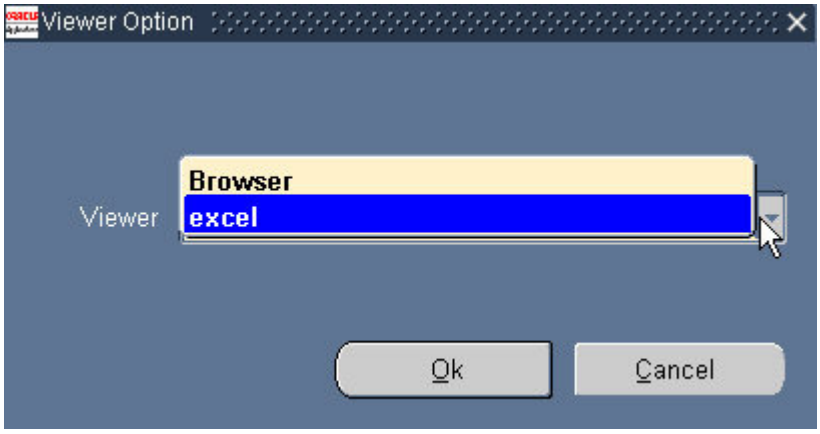

1. Select Browser or Excel from the List of Values and select (B) OK.

    - Your computer will provide windows for file download procedures and you may save the file for continued use.

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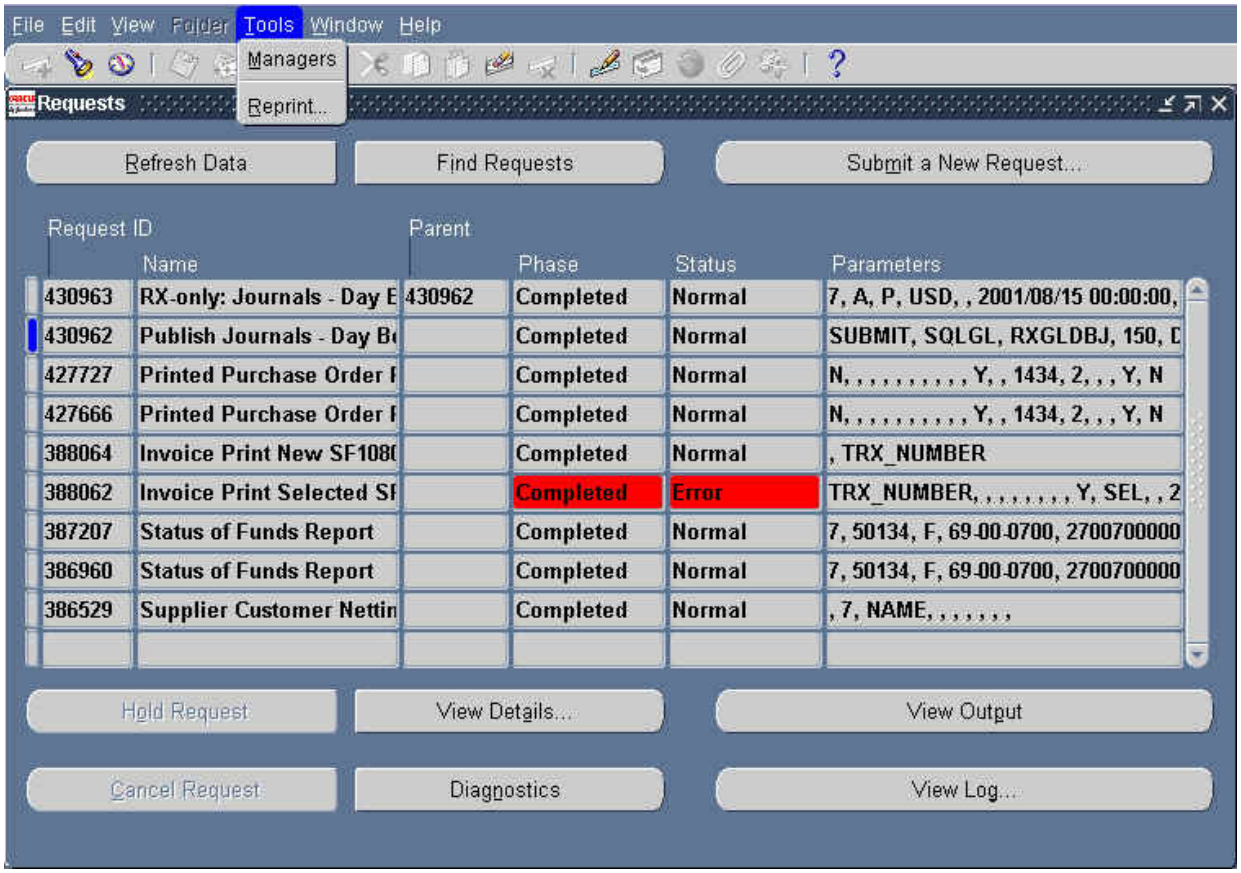
Reprinting a Report

Toolbar

Oracle Applications
N→Other→Requests
B→Find
M → Tools → Reprint
Requests



Reprinting a Report That Has Already Been Run

1. Navigate to the Requests window and select your request.

2. From the Toolbar window, select (M) Tools → Reprint.

The Reprint options window will open.

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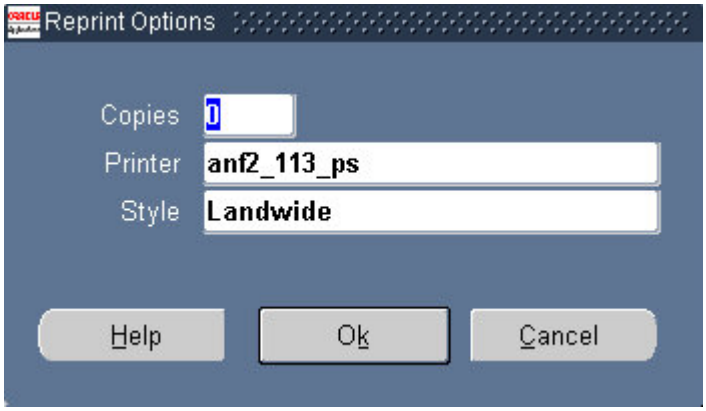

3. Change your parameters and select (B) OK.

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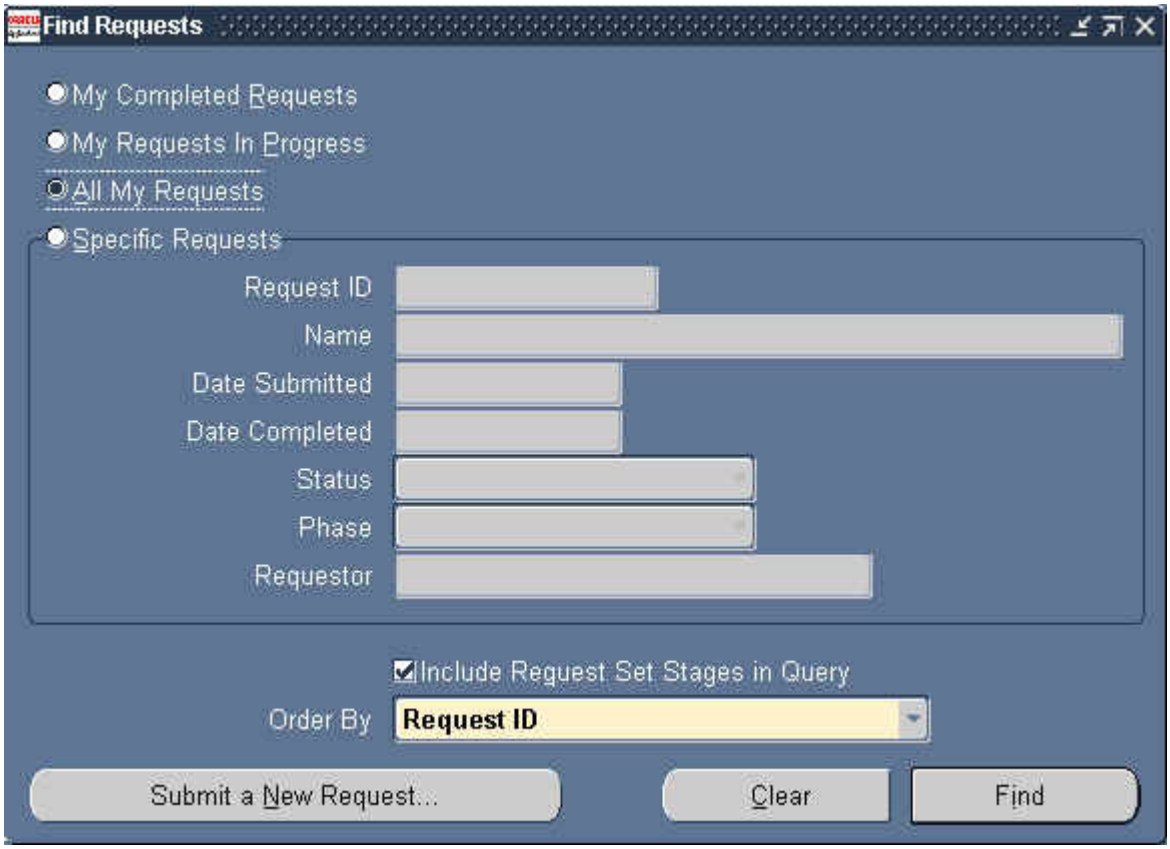
Requests

Oracle Applications
M → View → Requests
Find Requests

Note: The path used depends on the responsibility.



1. Enter specific criteria in the Find window that appears, or select (B) Find to display all of your requests that you have submitted.

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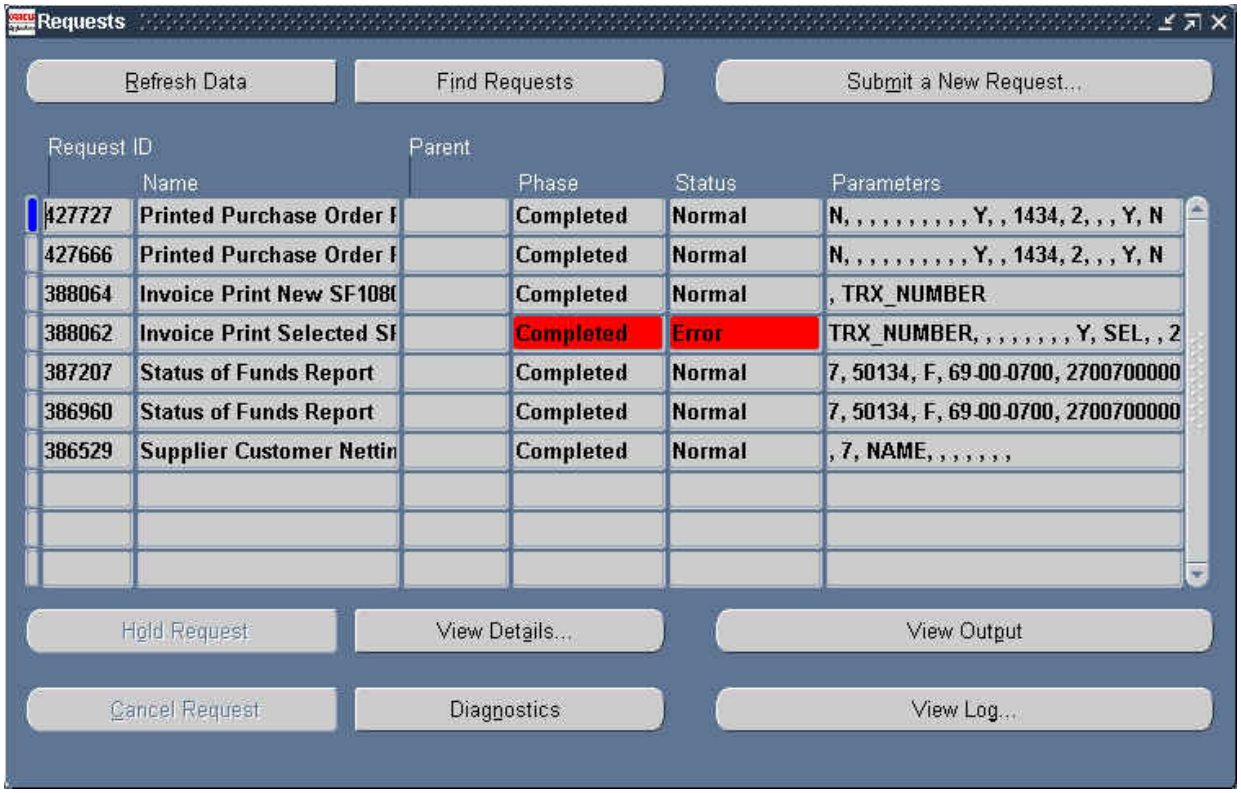

Viewing and Changing Requests

Since all reports, programs, and request sets are run as concurrent requests in Oracle Applications, you can navigate to the Request window to view the progress and output of all your concurrent requests, and you can change aspects of a request's processing options.

Using the Request Window

You can use the Request window (summary and detail) to view a list of all the submitted concurrent requests, check whether your request has run, change aspects of a requests' processing options, diagnose errors, or find the position of your request in the queues of available concurrent managers.

How to Use the Request Window

You can select various buttons in this window to perform tasks relating to concurrent processing.

- Refresh Data button: The Requests window will not automatically refresh in order to display updated progress of your request. Use this button to requery the lines in the request table.
- Find Request button: Displays the Find Request window to perform a search for additional requests
- Submit New Request button: Displays the Submit Requests window to submit a new request to the concurrent manager

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- Hold Request and Cancel Request buttons: These buttons illuminate if the concurrent manager has not already begun running the program. You could Hold or Cancel a request by using these buttons.
- View Details button: Displays the Details window to view detailed information about your request, for example, submission dates, scheduling and other information. If a request has not already run, you can change selected fields so that the updated information will affect your request when run by the concurrent manager.
- Diagnostics button: Displays diagnostic information about your request such as when it ran and if it completed successfully
- View Output button: Displays an online format of your report.
  - Note: The program must have an actual paper output to make it possible for online viewing.
- View Log button: Displays information about the request regarding arguments used and other technical information.
- Cancel Request button: Cancels a request in the pending or running phase-cannot be undone.

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Four Phases of a Concurrent Request

Concurrent Request Phase and Status Information

The Concurrent Requests Summary window displays a phase and status summary for each concurrent request listed in the window.

A concurrent request has a life cycle consisting of the following phases:

- Pending
- Running
- Completed
- Inactive

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Four Phases of a Concurrent Request

During each phase, a concurrent request has a specific condition or status. The table lists each phase/status combination and describes its meaning in relation to a request.

Phase	Status	Description
PENDING	Normal	Request is waiting for the next available manager.
PENDING	Standby	Program to run request is incompatible with other program(s) currently running.
PENDING	Scheduled	Request is scheduled to start at a future time or date.
PENDING	Waiting	A child request is waiting for its Parent request to mark it ready to run. For example, a request in a request set that runs sequentially must wait for a prior request to complete.
RUNNING	Normal	Request is running normally.
RUNNING	Paused	Parent request pauses for all its child requests to finish running. For example, a request set pauses for all requests in the set to complete.
RUNNING	Resuming	All requests submitted by the same parent request have completed running. The Parent request resumes running.
RUNNING	Terminating	Request is terminated by choosing the *Cancel Request* button in Request window.
COMPLETED	Normal	Request completed successfully.
COMPLETED	Error	Request failed to complete successfully.
COMPLETED	Warning	Request completed with warnings. For example, a request is generated successfully but fails to print.
COMPLETED	Cancelled	Pending or Inactive request is cancelled by choosing the *Cancel Request* button in the Requests window.
COMPLETED	Terminated	Request is terminated by choosing the *Cancel Request* button in the Request window.
INACTIVE	Disabled	Program to run request is not enabled. Contact your system administrator.
INACTIVE	On Hold	Pending request is placed on hold by choosing the *Hold Request* button in the Requests window.
INACTIVE	No Manager	No manager is defined to run the request. Check with your system administrator. A status of No Manager is also given when all managers are locked by run-alone requests.

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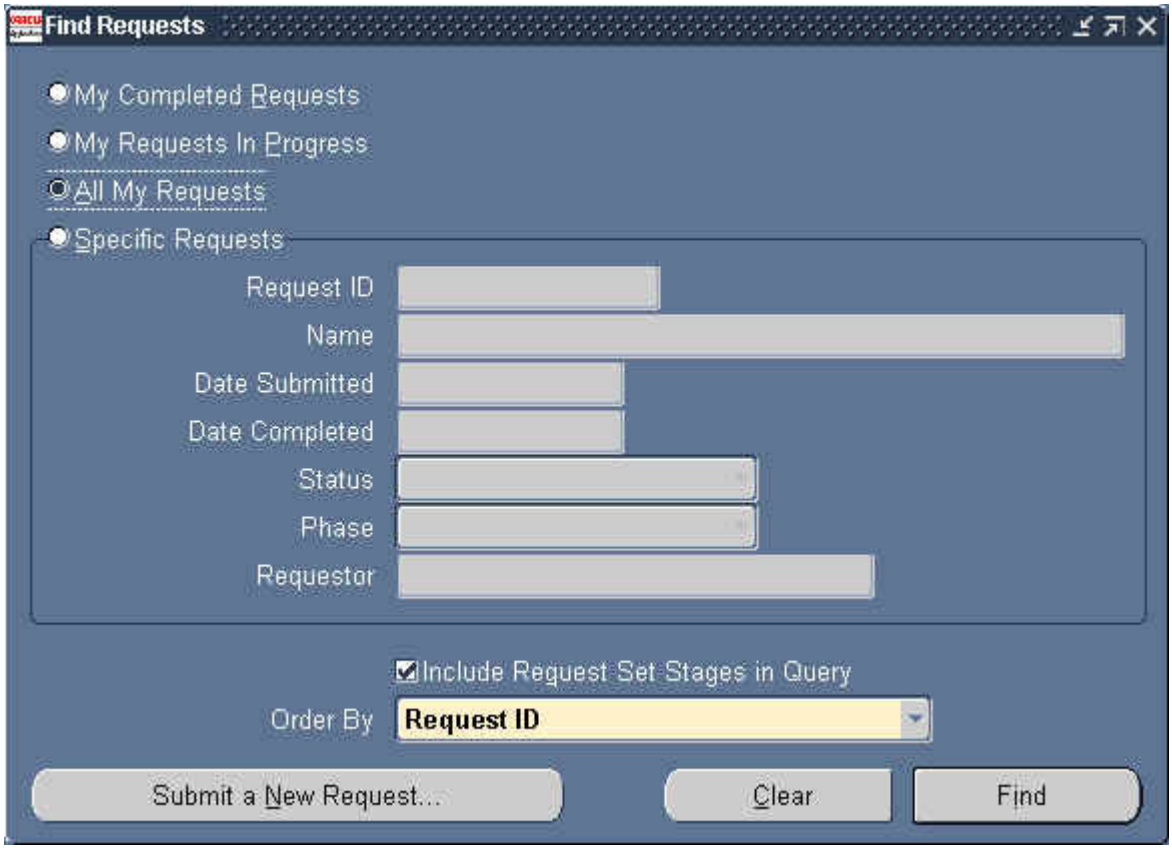
Canceling Requests

Requests

Oracle Applications
N → View → Requests
Find Requests



Canceling or Holding a Request That Has Not Yet Completed

1. Select the Specific Request option button.

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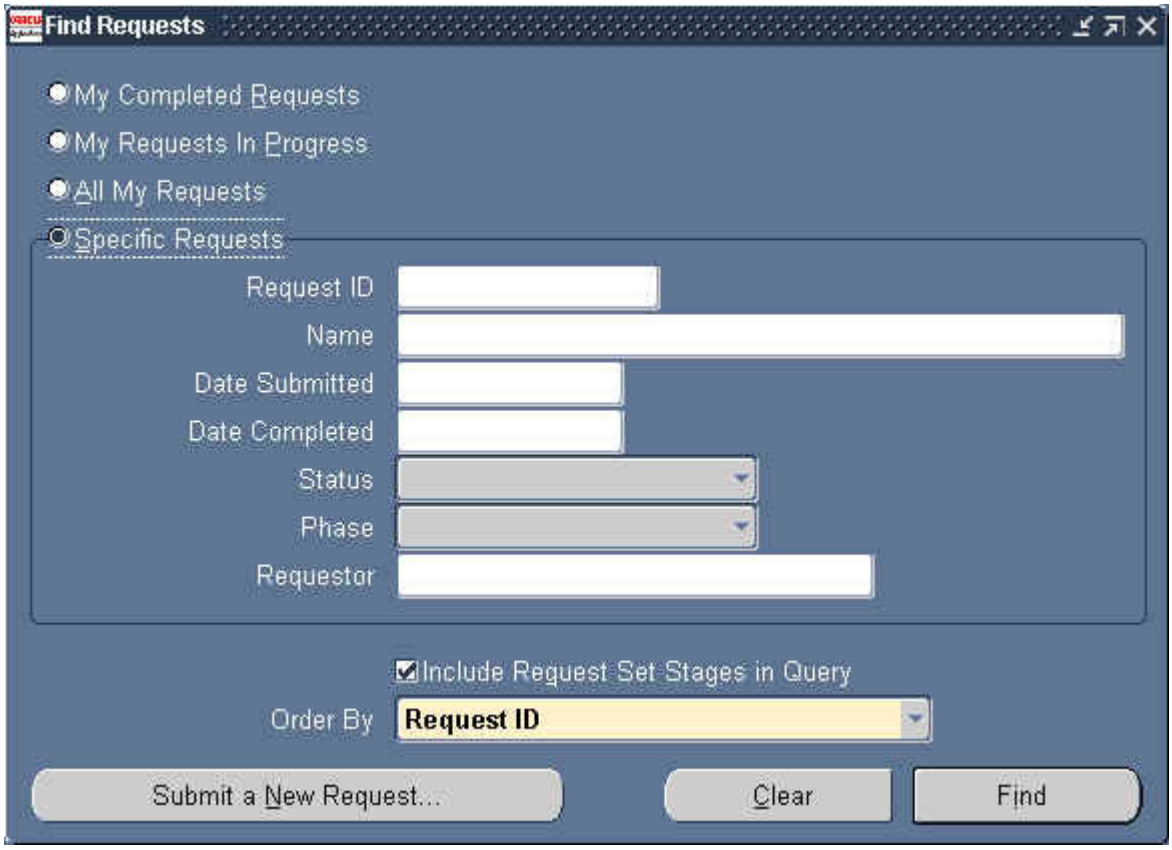

2. Enter the Request ID or other appropriate search criteria.

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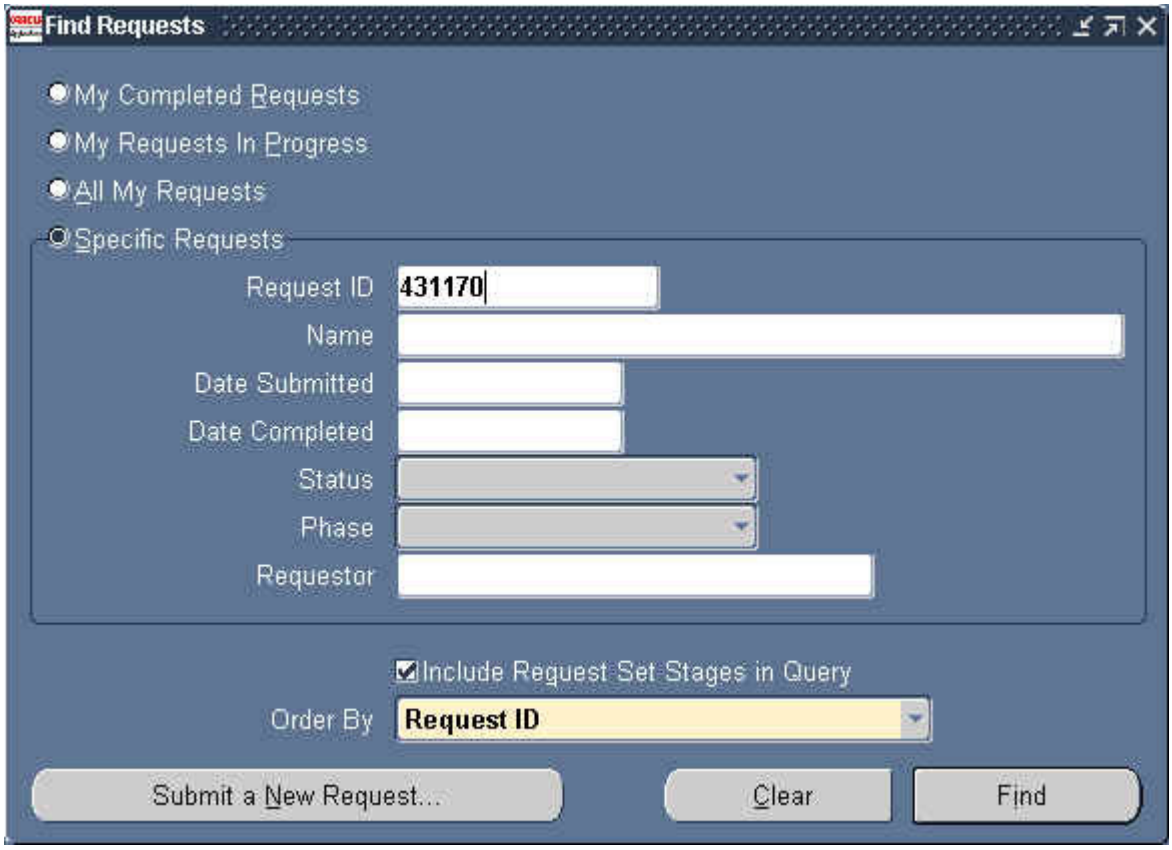

3. Select (B) Find.

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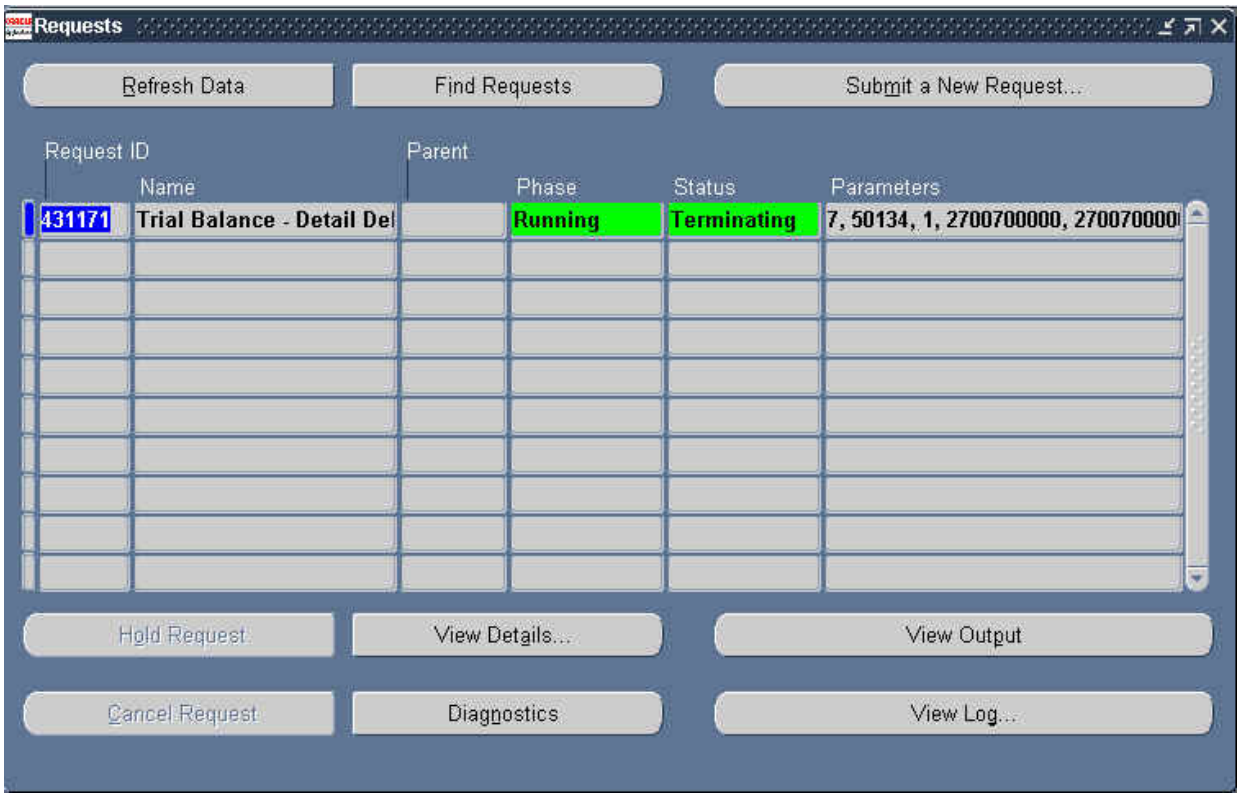
4. Select (B) Cancel Request.

5. Select (B) Yes.



Status will show Terminating or Terminated.

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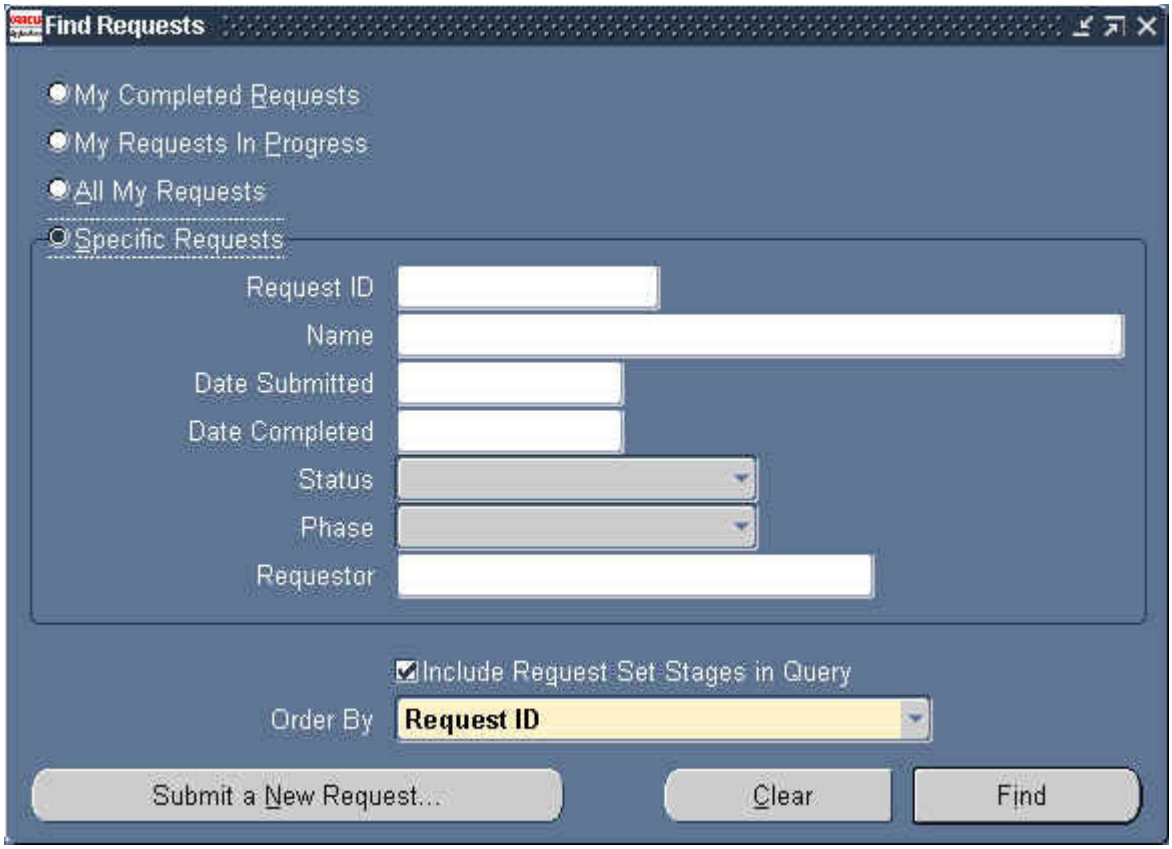
Requests

Oracle Applications
N → Other → Requests → Specific Request
Find Requests



1. Select Specific Requests and enter the Request ID.

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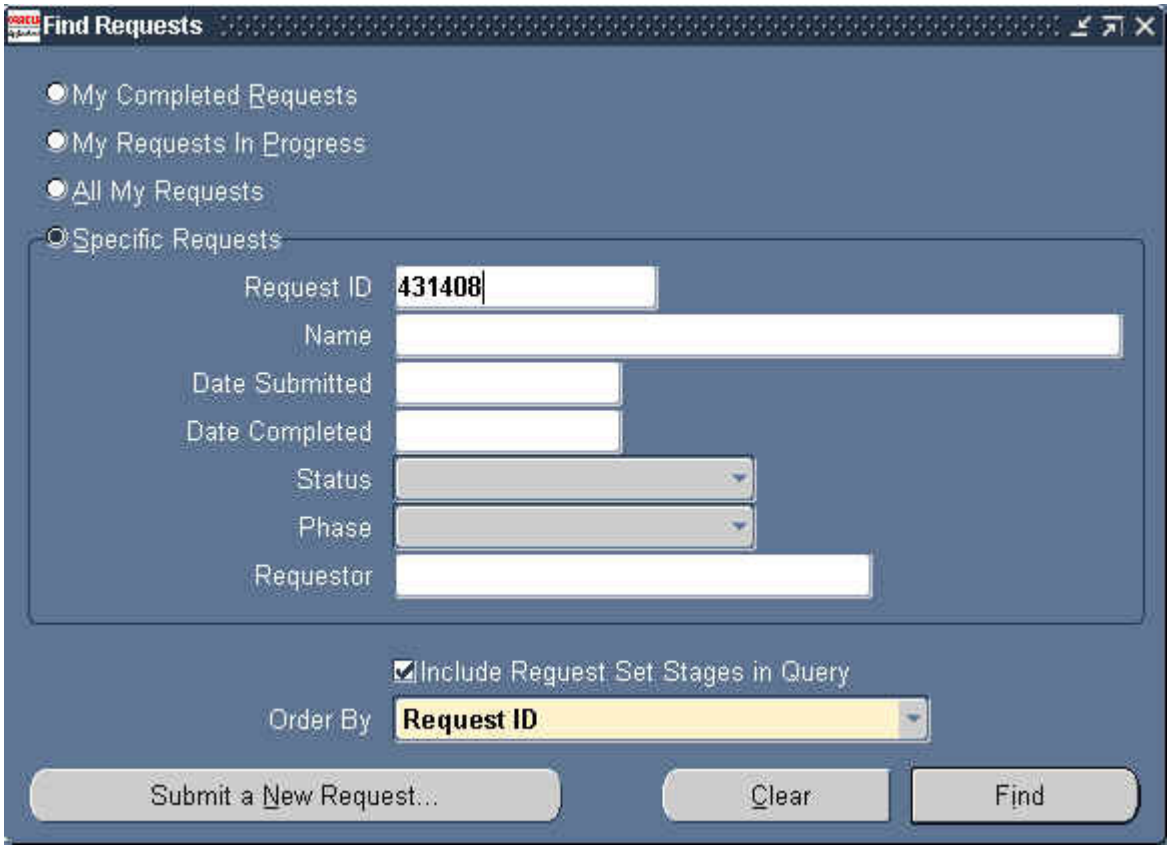
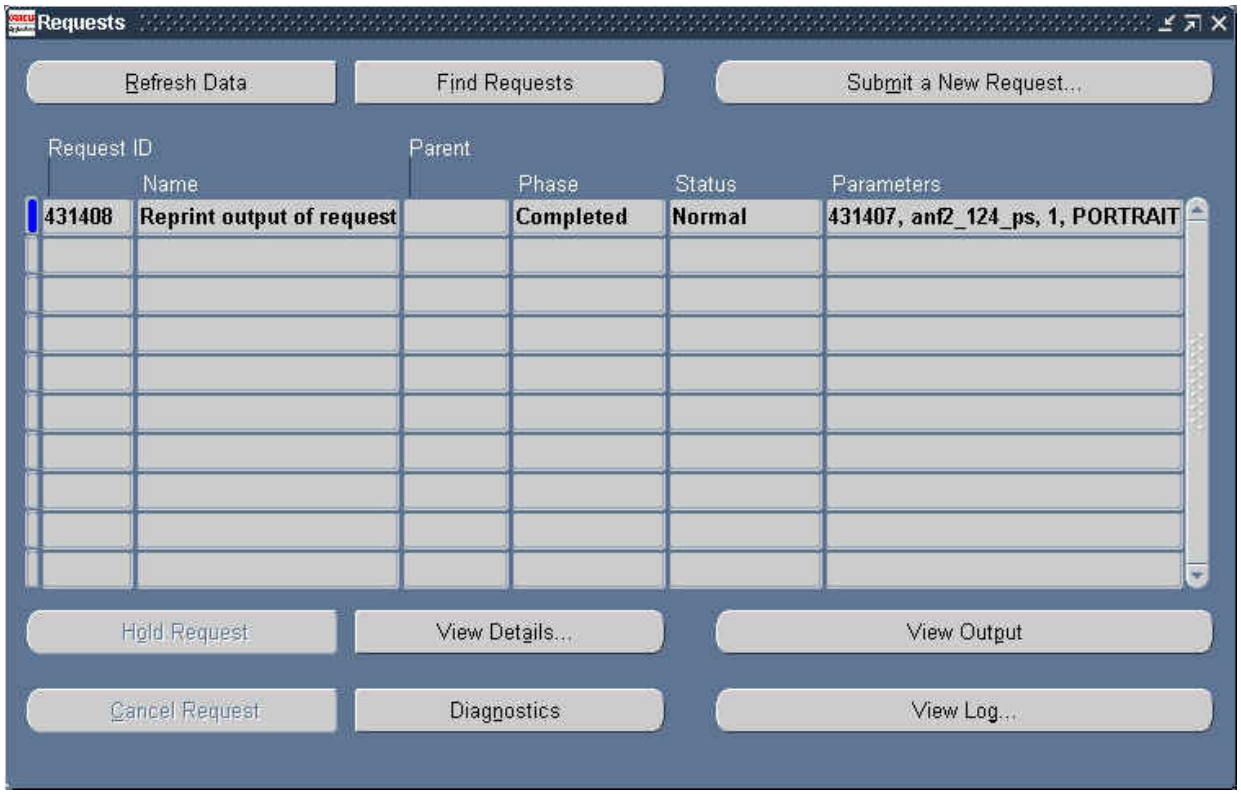


2. Select (B) Find.



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Changing Request Options

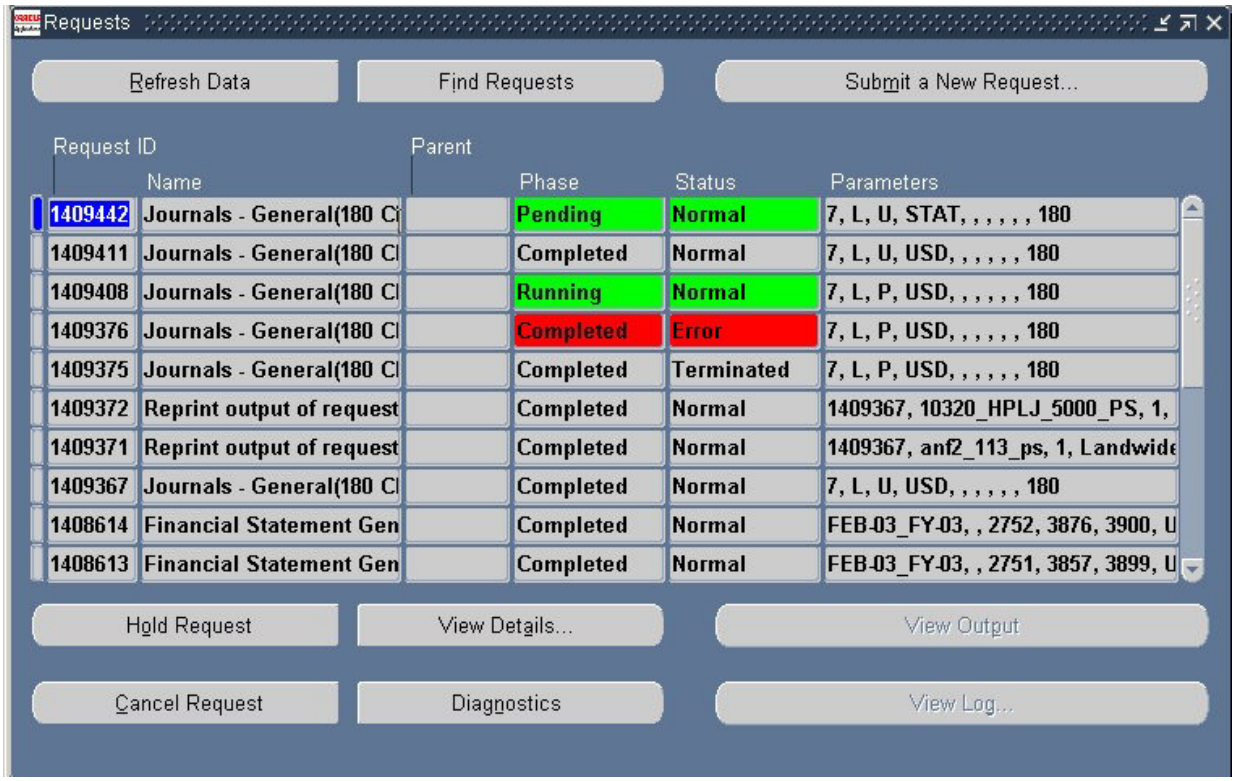
If your request has not started running, you can change how your request runs and prints its output by using the Requests window

How to Change the Request Options of a Request

1. Navigate to the Requests window.

2. Use the Find window to search for your request.

3. Select (B) Hold Request to put your request on hold.



4. You can change the start date and time for your request. If the request is Pending or Scheduled, you can change the printer, the number of copies you want to print, and whether Oracle Application saves your report output to an operating system file. You can also change resubmission options in this window.

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Summary

- Standard Request Submission (SRS)
- The Requests window
  - Searching for a request
  - Summary and detail information
- Status information
  - Pending
  - Running
  - Completed
  - Inactive

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Lab 1: Running Reports and Programs

1. Log on using the FRA GL Systems Accountant responsibility.

2. Navigate to the Requests window.

3. Run the Journals General (180 Char) report as soon as possible, and use the system defaults for the required fields. Select Type: Line item. Select Posting Status: Unposted Journals. Select Currency: USD.

4. Navigate to the Requests window and view all of your requests.

5. Use the Refresh button to update the window and continue until your report is complete.

6. View the output online.

7. Change the font size in order to view the entire page of the report on your desktop.

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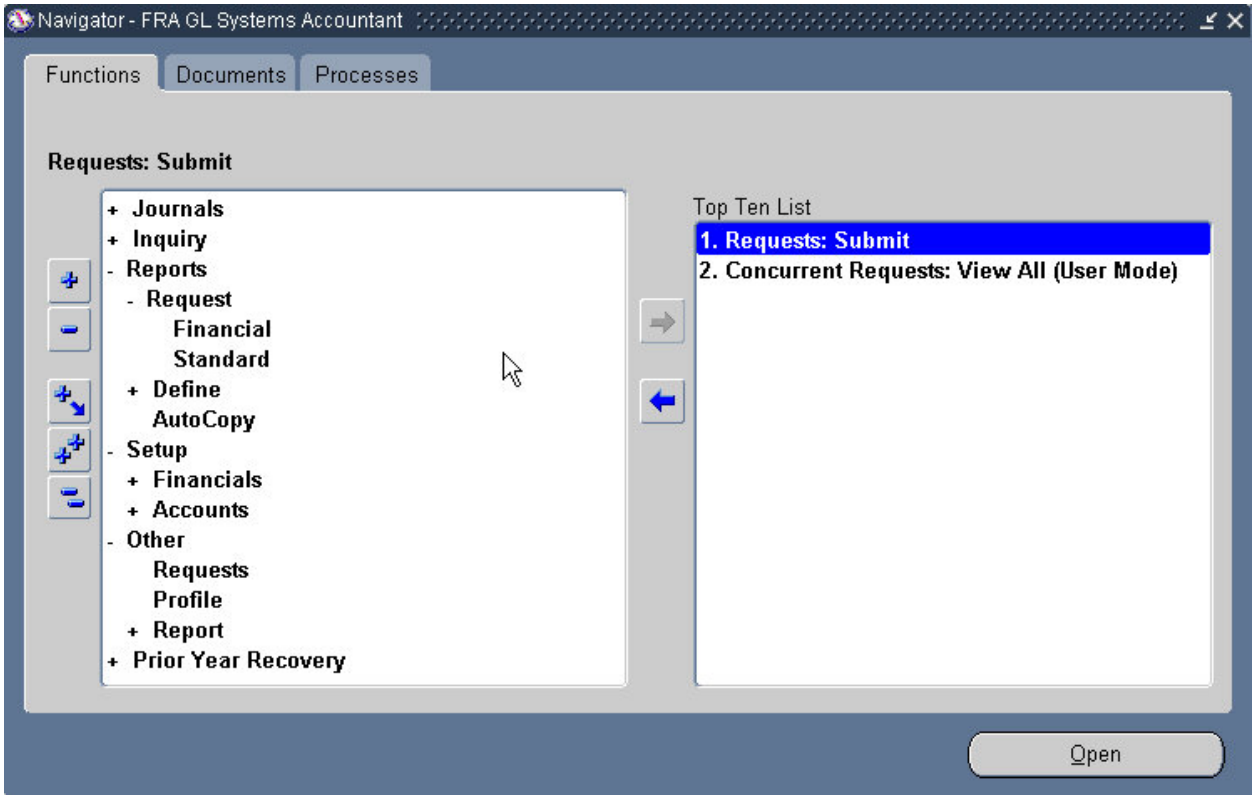
Lab 1 Solutions: Running Reports and Programs

1. Choose the FRA GL Systems Accountant responsibility.

2. Navigate to the Requests window.

3. Verify that your window appears similar to the one displayed below.



4. At the Navigator window, select N → Reports → Request → Standard or select N → Other → Requests to get to the Requests window.

5. Accept Single Request with (B) OK

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6. In the Request Name field, use the List of Values to select the AP Trial Balance Report and select (B) OK.

7. In the Parameters window, select Line Item from the Type LOV.

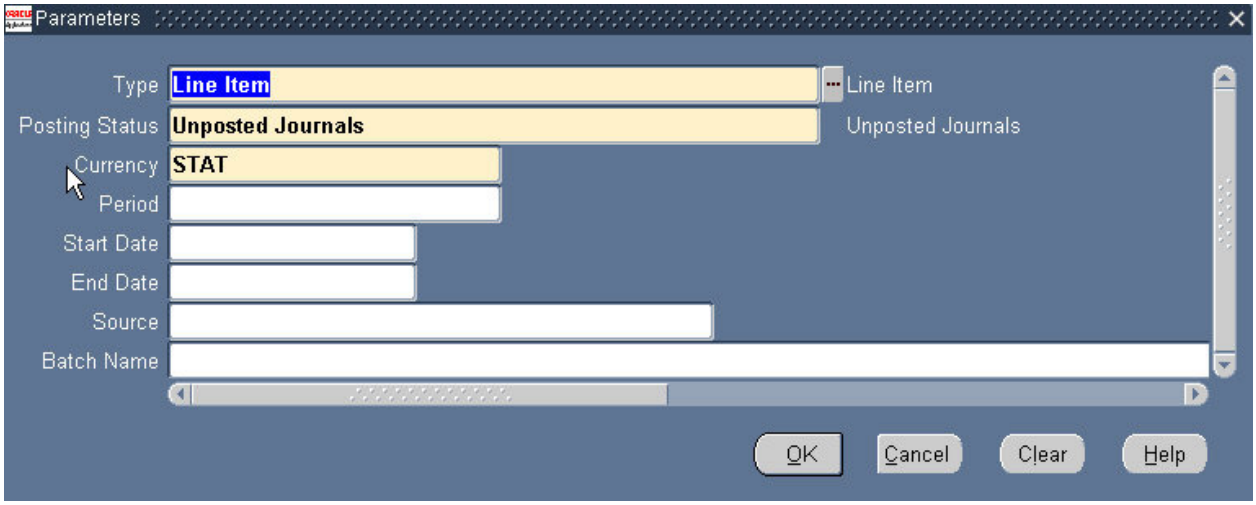
8. Select (B) OK.

9. In the Currency LOV select USD.

10. Select (B) OK on the Currency window.

11. Select (B) OK on the Parameters window.

12. Verify that your window appears similar to the one displayed below.



13. Select (B) Submit Request to run the report.

14. Verify that your window appears similar to the one display below.

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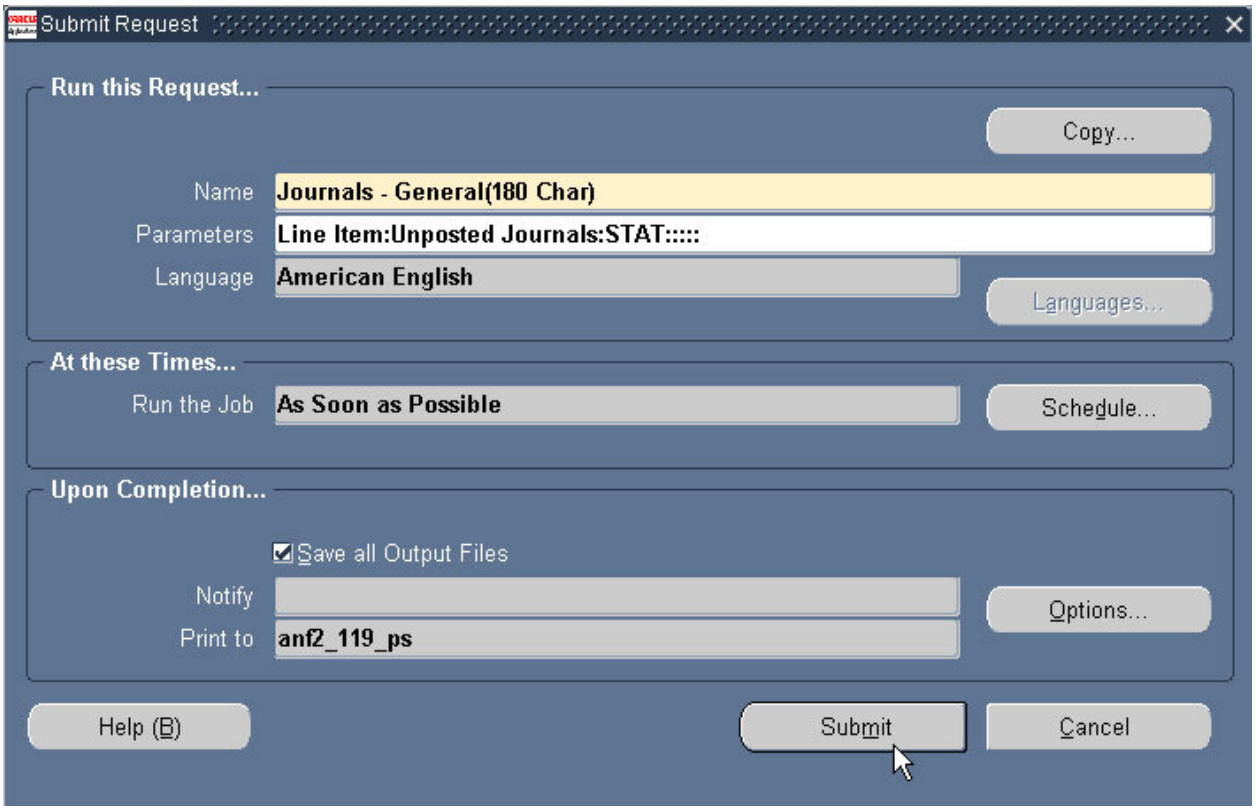

15. Navigate to the Requests window and view all of your requests.

16. After you select (B) Submit Request, the Requests summary window will display.

17. Verify that your window appears similar to the one displayed below.

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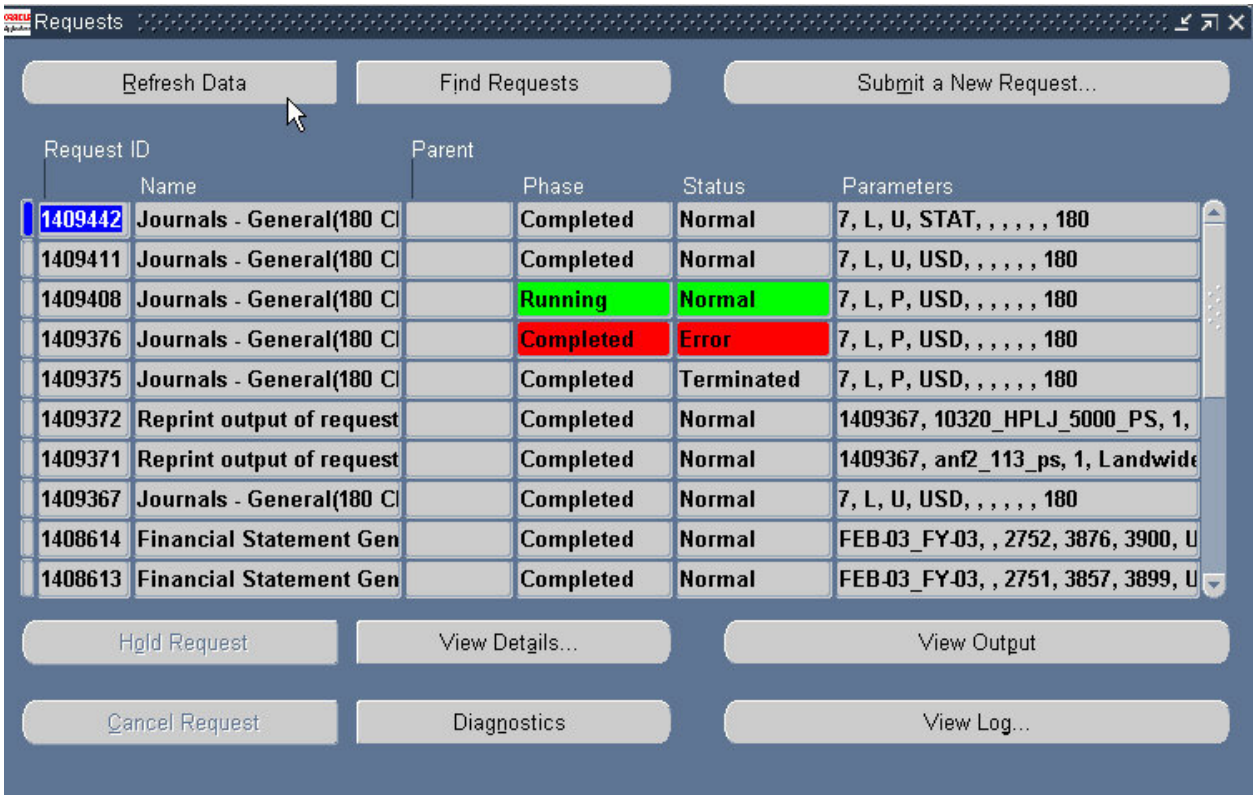
18. Use the Refresh button to update the window and continue until your report is complete.

19. Select (B) Refresh Data to view the progress of your report until it completes.

20. Verify that your window appears similar to the one displayed below.



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21. View the output online.

22. Select (B) View Output to see the report on your screen.

23. Change the font size in order to view the entire page of the report on your desktop.

24. Select the down arrow in the Font Size alternative region and select 6 to view the entire page on your screen.

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Customizing the Presentation of Data

Chapter 9

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Customizing the Presentation of Data

Section Objectives

At the end of this section, you should be able to:

- Save a document to your Navigator for easy access
- Customize the layout of data in a folder form
- Query records in a folder
- Use the folder tool palette
- Manage folder definitions

Personalizing Your Access to Oracle Applications

You can use several features of Oracle Applications to enhance your proficiency in the system. By using special forms, you can customize the presentation of data or fields. Additionally, you can create a folder definition that you can specify query criteria and rearrange the layout of the form. This lesson explains how to use these features to make your access to the system easier.

Saving a Document to the Navigator

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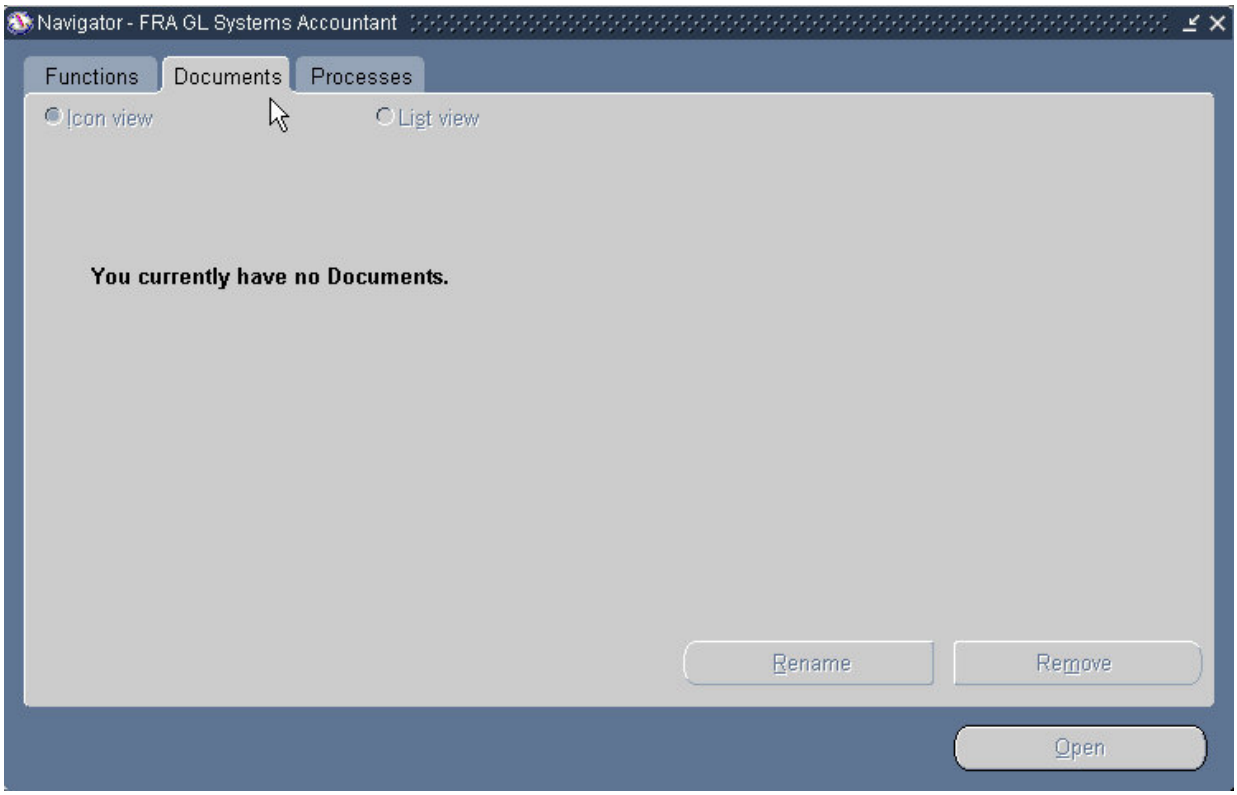
Saving a Document to the Navigator

Navigator

Internet Browser
N →Connect to Oracle Applications → Application Job Title
Navigator

Select the Documents tab.



Navigator: Documents

Using the Place on Navigator Option

Some Oracle Applications enable you to save a document to the Navigator for easy access when you first log into the system. The File menu on the Toolbar will illuminate the Place On Navigator option when it is available within your application.

You can save up to 99 documents to your Navigator. The Documents alternate region on the Navigator window will list those documents that you have saved. This eliminates having to query the database to find your specific document. Instead, you can select it from the Navigator window and go directly to the window containing your document.

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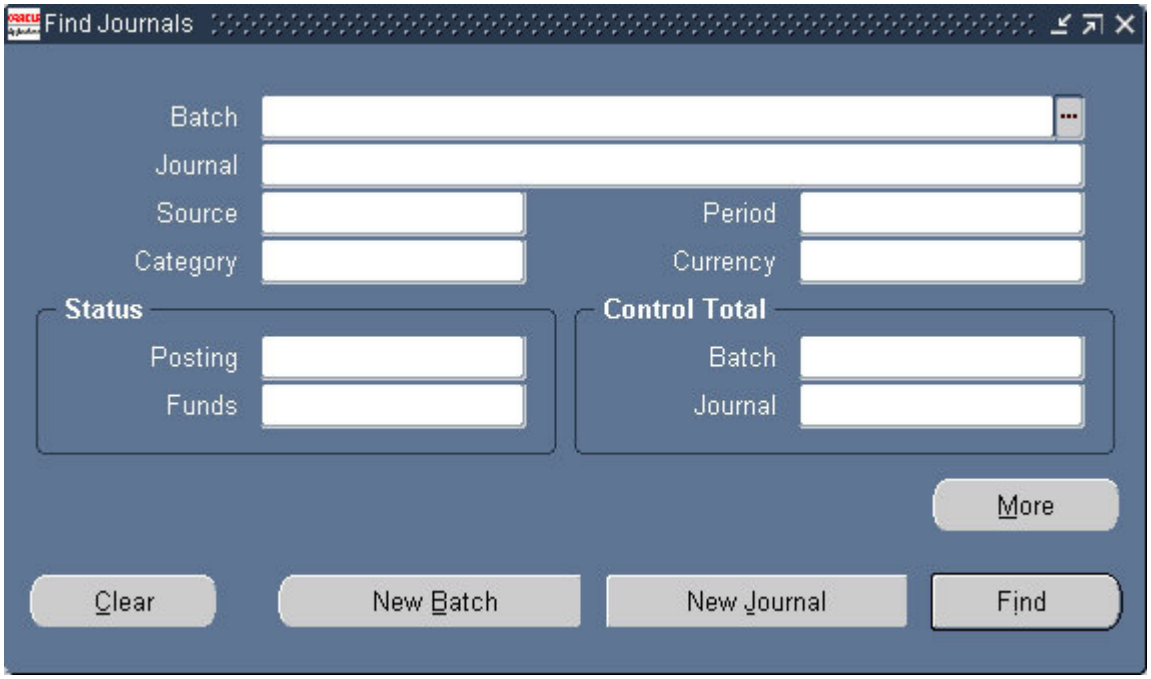
How to Place a Document on the Navigator Window

Oracle Applications
N → Journals → Enter
Find Journals



1. In the Find Journals window enter the search criteria for the journal you desire to place on the Navigator.

   Note: You may use this feature in several forms of various applications or responsibilities.

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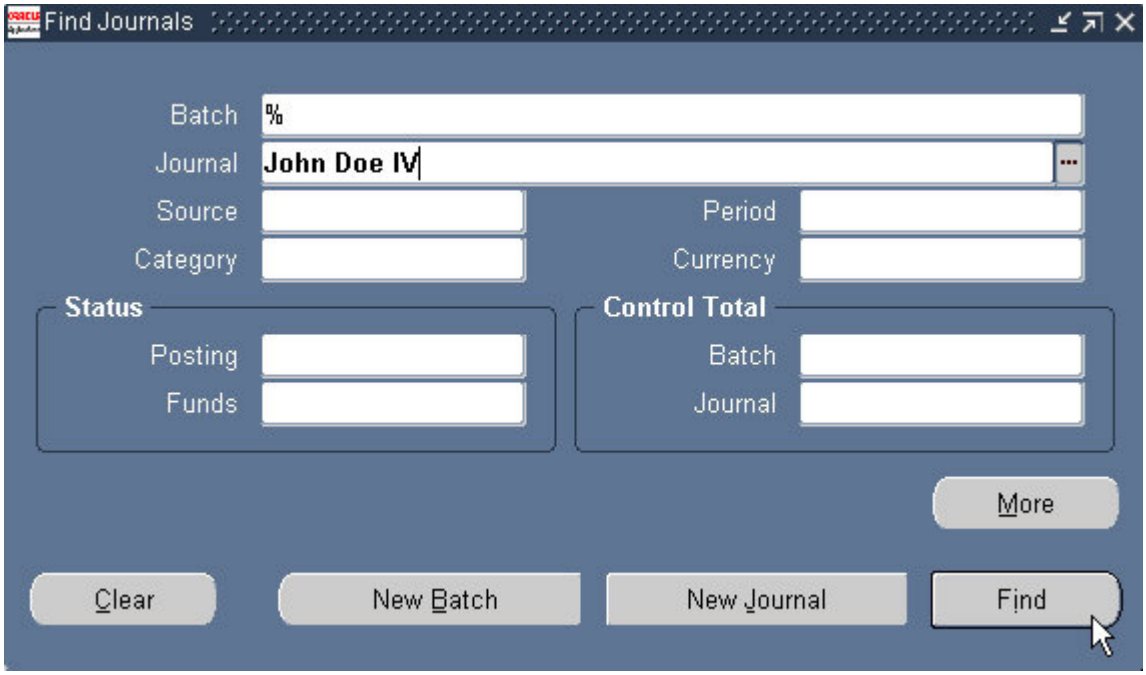
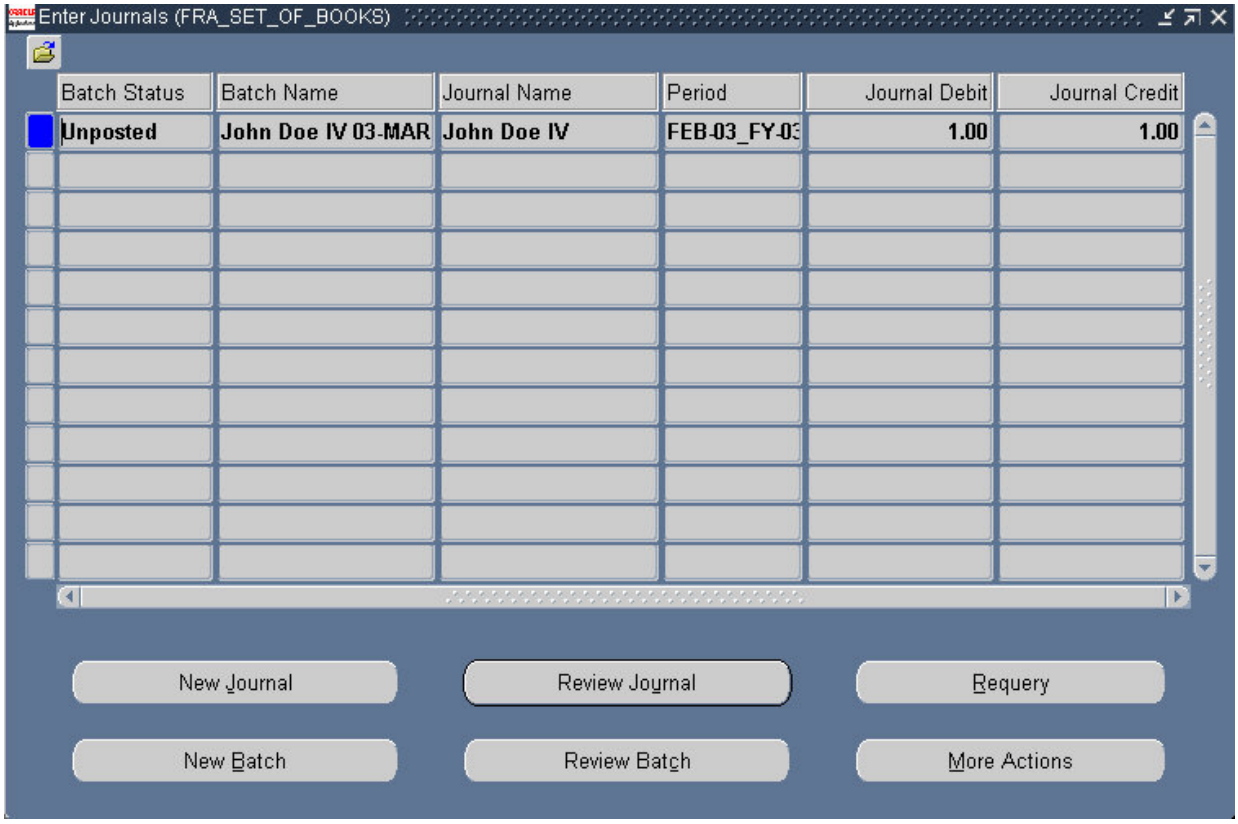


2. Select (B) Find.



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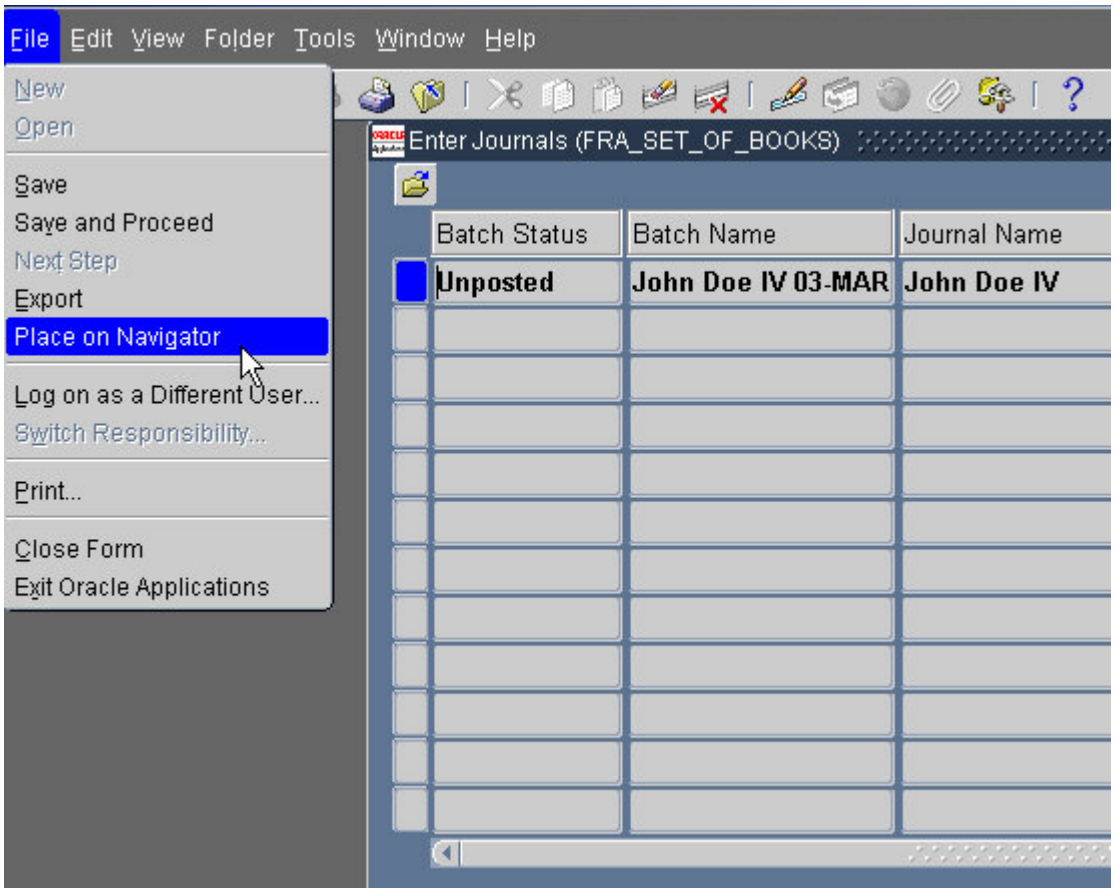
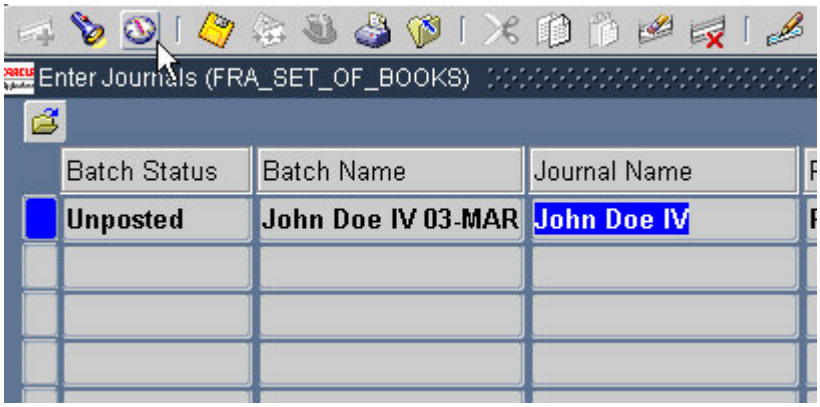
3. Select (M) File → Place on Navigator.



4. On the toolbar locate (I) Show Navigator.



5. Select (I) Show Navigator.

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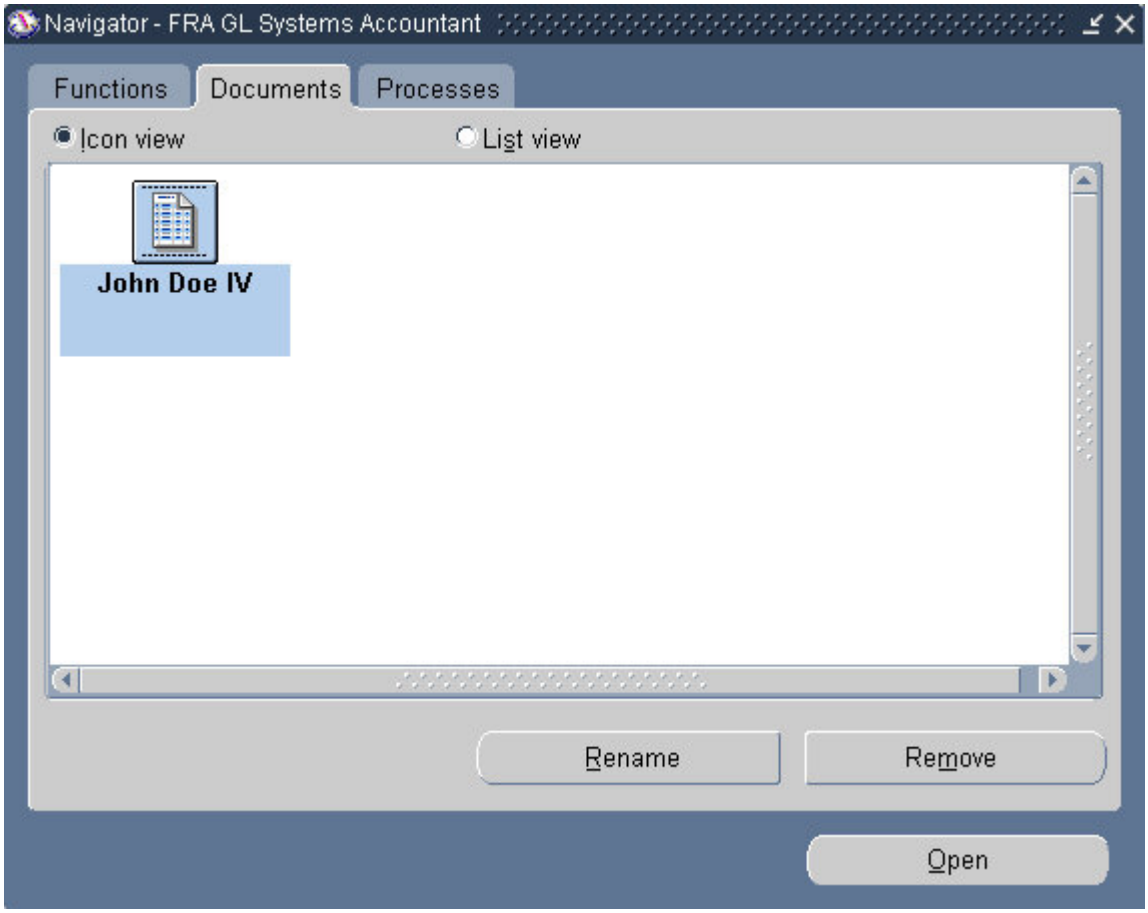

There are two views. The icon view above will show your documents as icons.

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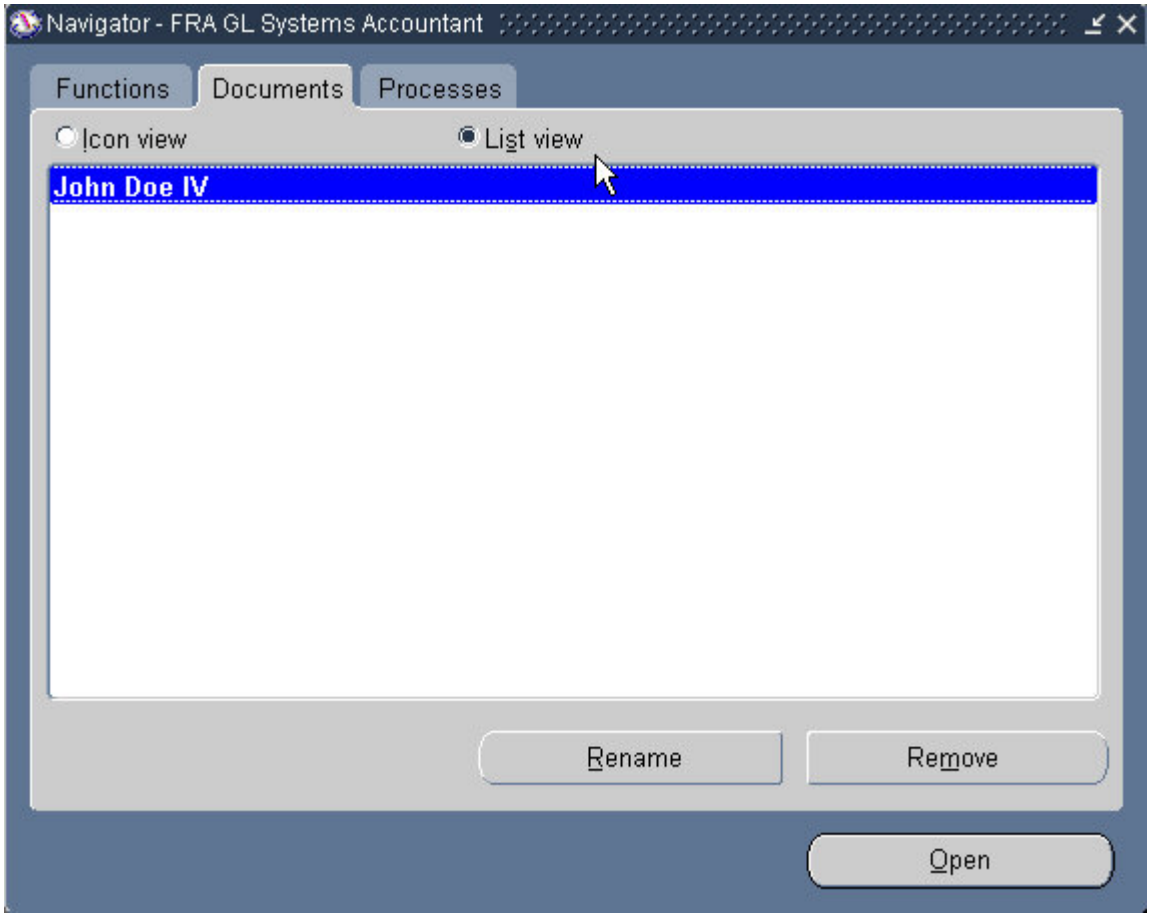

6. Select (B) List View.

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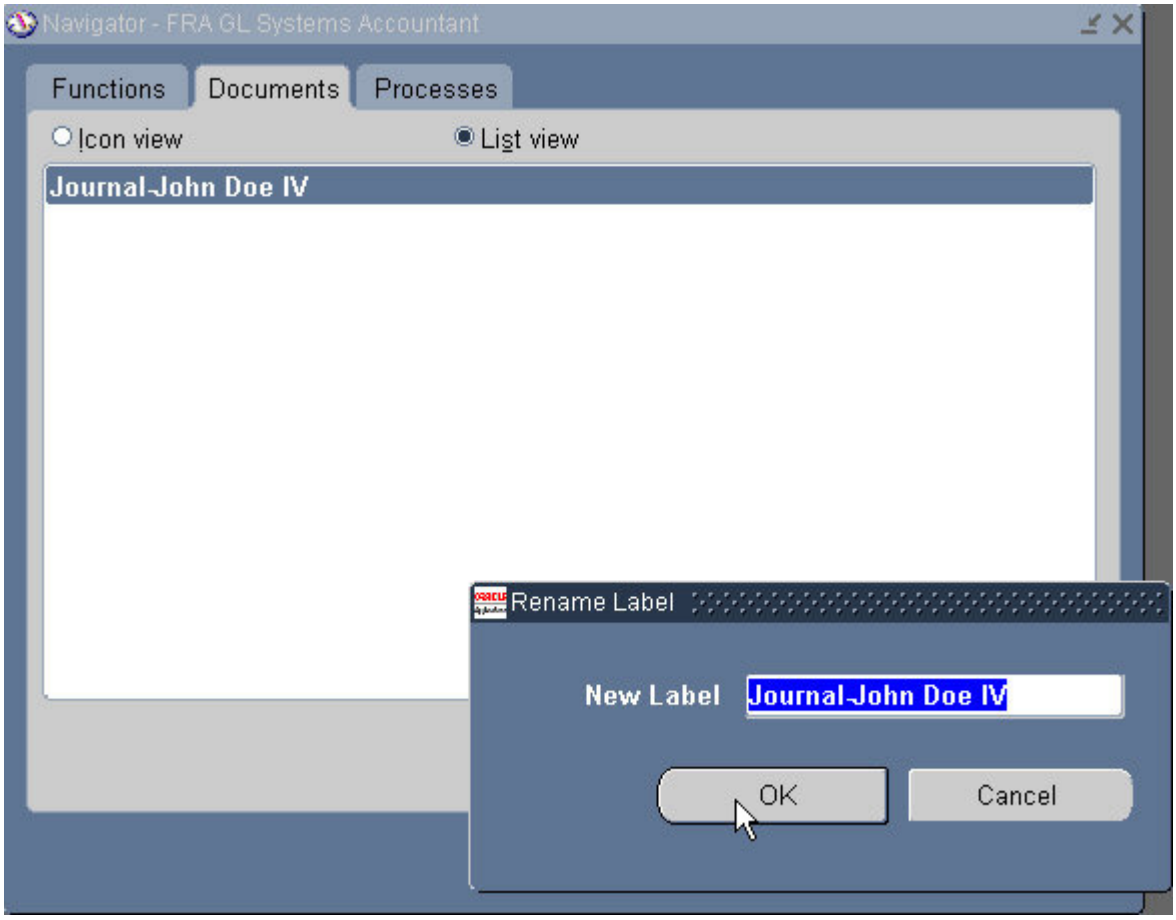
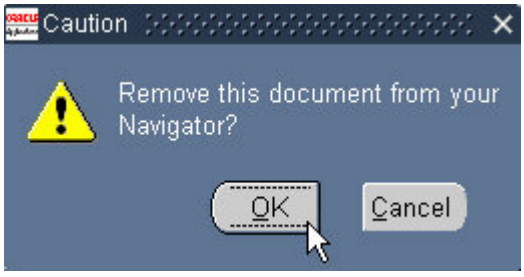


7. Select (B) Rename. The Rename Label window will appear. Rename the document and select (B) OK.

8. To remove a document, select (B) Remove while still on the Documents tab.



9. Select (B) OK. A Caution message will appear. Select (B) OK.

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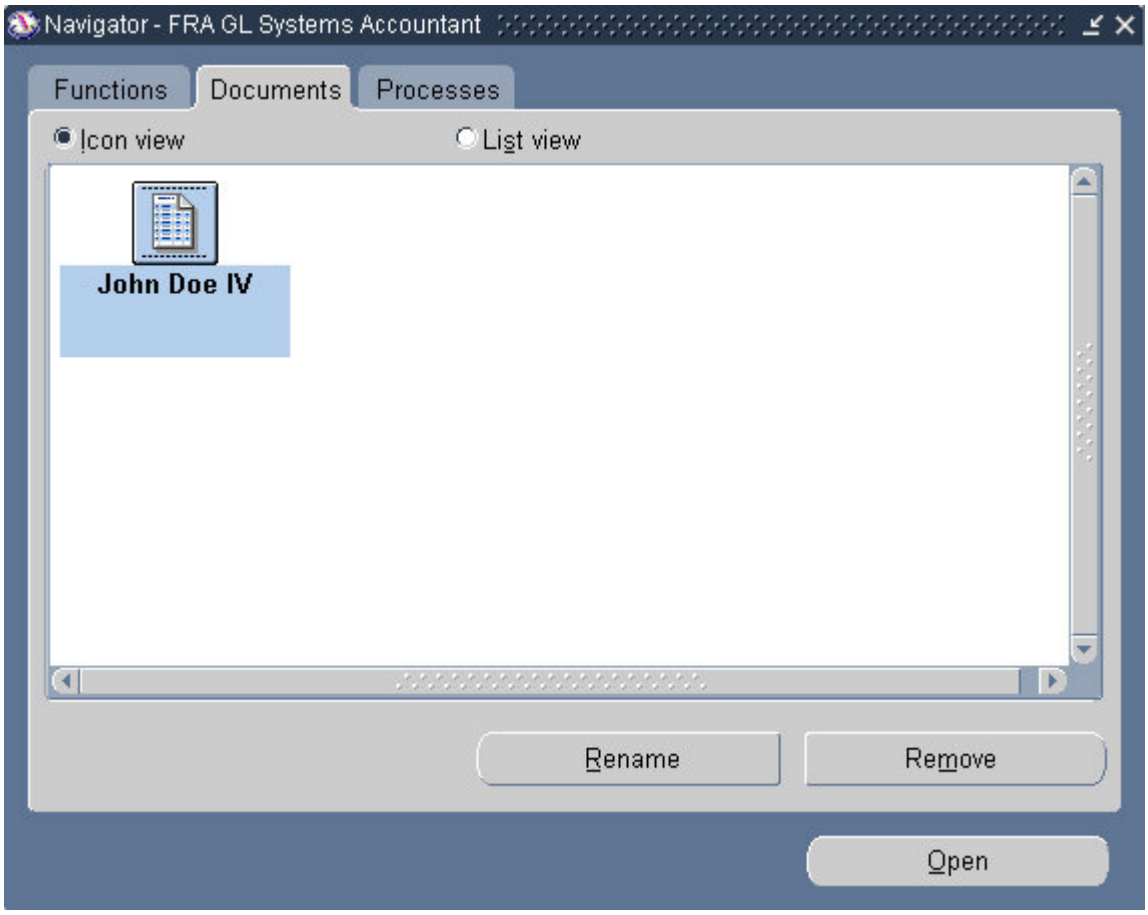
How to Access a Document on the Navigator Window

1. Navigate to the Navigator window and select the Documents tab.3



2. In the Document Tab, select the document from the list of documents displayed to go directly to the applications form window for that document.

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Using the Navigator's Processes

The Processes region of the Navigator (the "Process Navigator") automates business flows across Oracle Applications forms. The Process Navigator guides you step-by-step through each required function in a business process.

How to Open an Existing Process Instance

1. In the Processes Tab, select the process instance you want to open in the Navigator Processes list.

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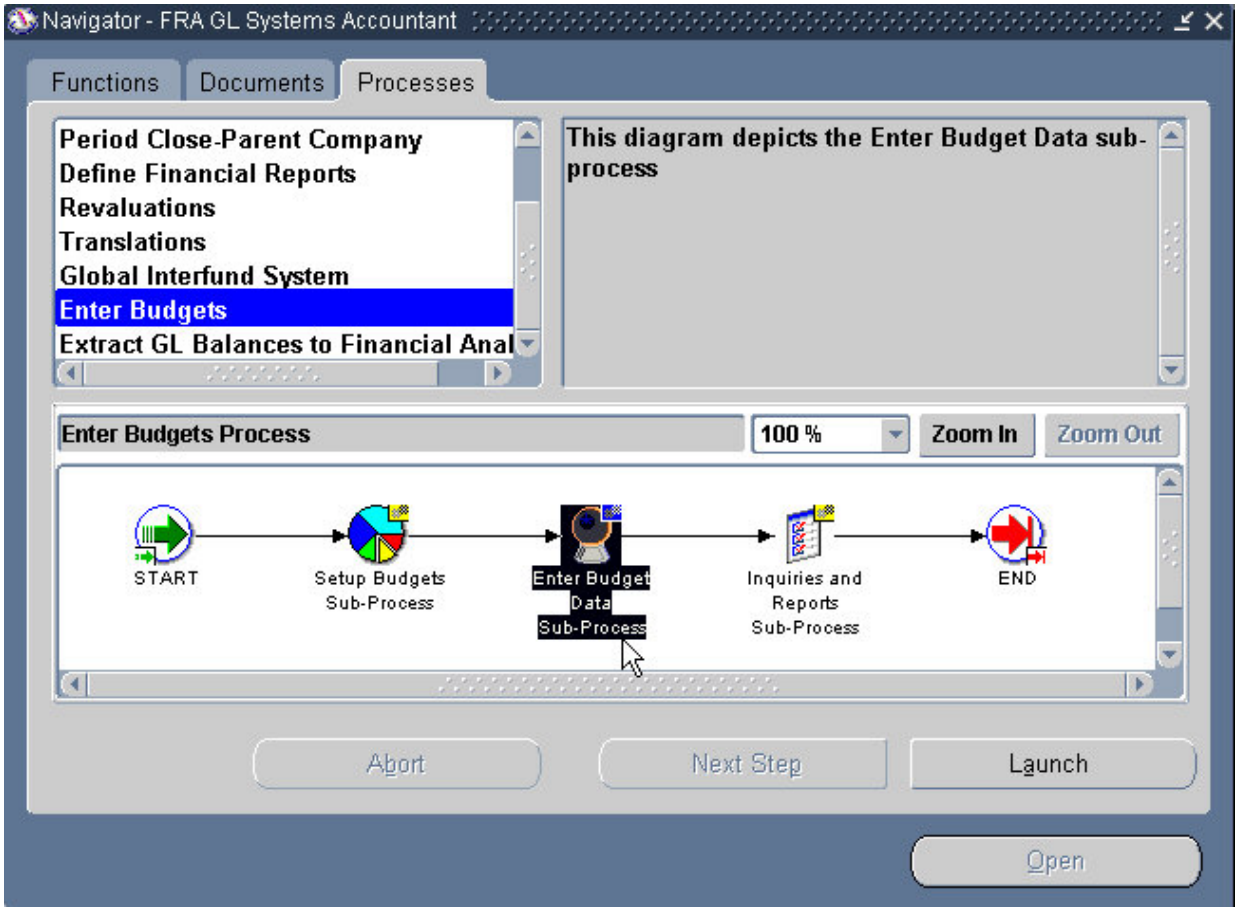

Notice the pointer in the window displayed above. When a single process step has subsidiary steps a small yellow icon appears denoting more steps can be accessed by selecting the icon for the sub-process. The window below shows the sub-process selected.

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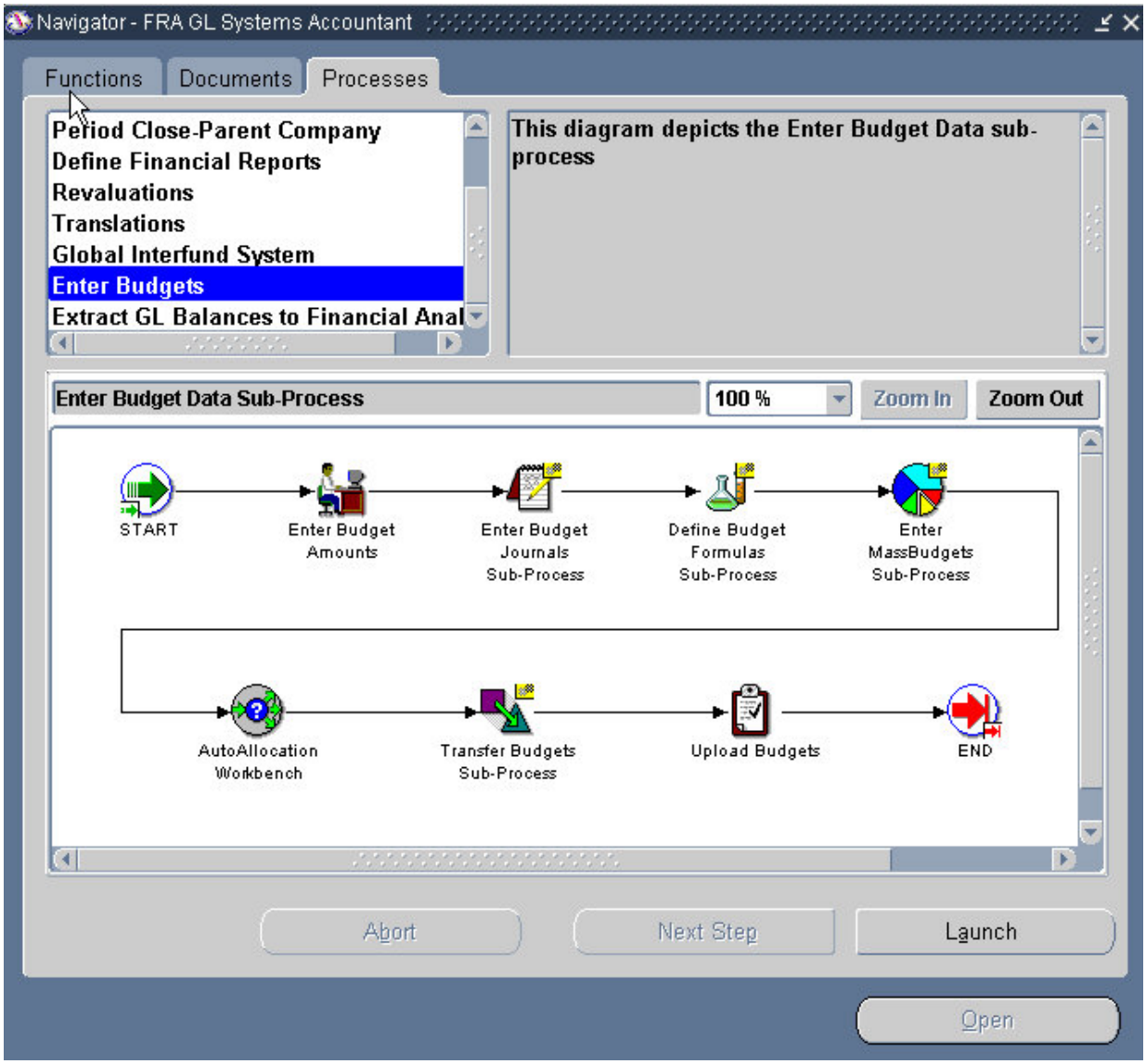

The Launch button is used by the System Administrators with access to another product tool used to draw new or update existing processes

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Basic Business Needs of a Folder

Oracle Applications Folder

A folder is a special block in which the field and record layout can be customized. You can identify a folder from a regular block by noting that an Open Folder button appears in the upper-left corner of a folder block, or than an enabled Folder Tools button appears on the toolbar when your cursor is in a folder block.

Although you have access to all of the records of a specific entity in a folder, you can customize a folder to retrieve only a subset of records and display those records in a specific layout. You can save your customizations to a folder definition, which defines the layout of your fields and the query criteria used to retrieve your subset of records.

Note: With the addition of mulitlanguage support, Folders are now associated with specific languages as defined at the Site responsibility profile level.

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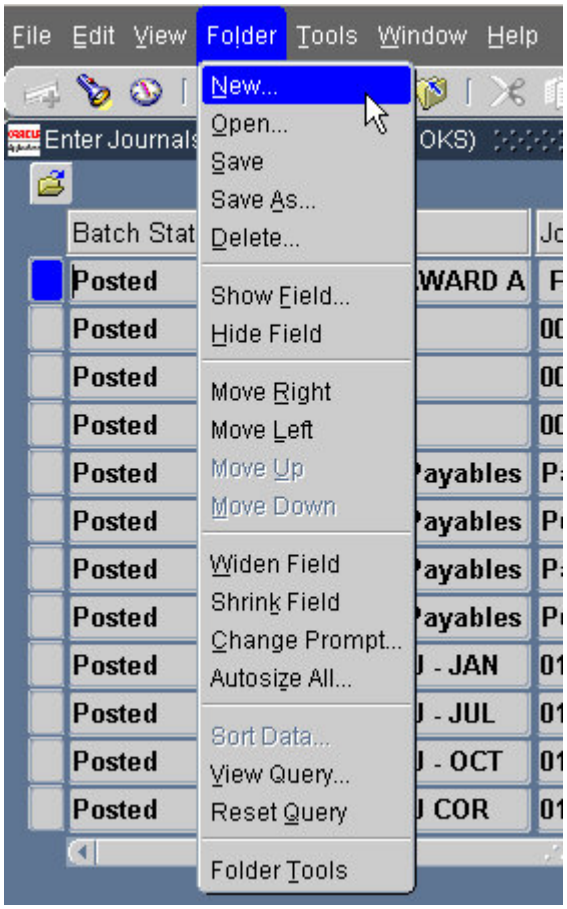
Toolbar

Oracle Applications M → Folder → New Toolbar



Folder Definitions

You can create and save new folder definitions or open and delete existing folder definitions. When you open a new folder definition, the layout for the new folder definition replaces the layout for the current folder definition.

How to Create a New Folder Definition

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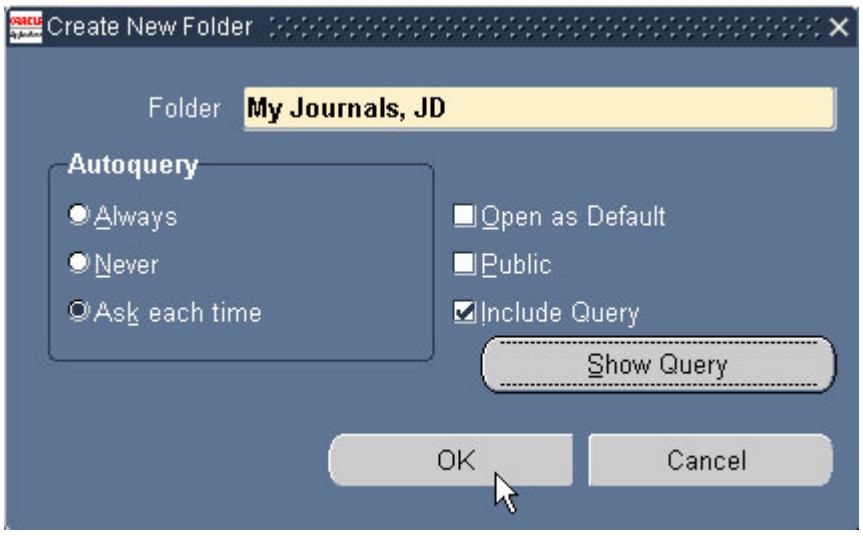
Oracle Applications M → Folder → New Create New Folder

1. Enter a new and unique folder name.



2. Select the Autoquery frequency in which you want the folder to automatically query for a subset of records each time you open the folder definition (Always, Never, Ask each time).

3. Select from the following additional options.

   - Open as Default if you want this specific folder definition to open as your default each time you navigate to this folder for the first time after invoking the form.

   - Public if you want other Oracle Applications users to have access to this folder definition.

   - Always accept the check in the checkbox Include Query.

     - Select (B) Show Query to view the SQL or query statements.

4. Select (B) OK when you are finished.

5. View the folder item or items.

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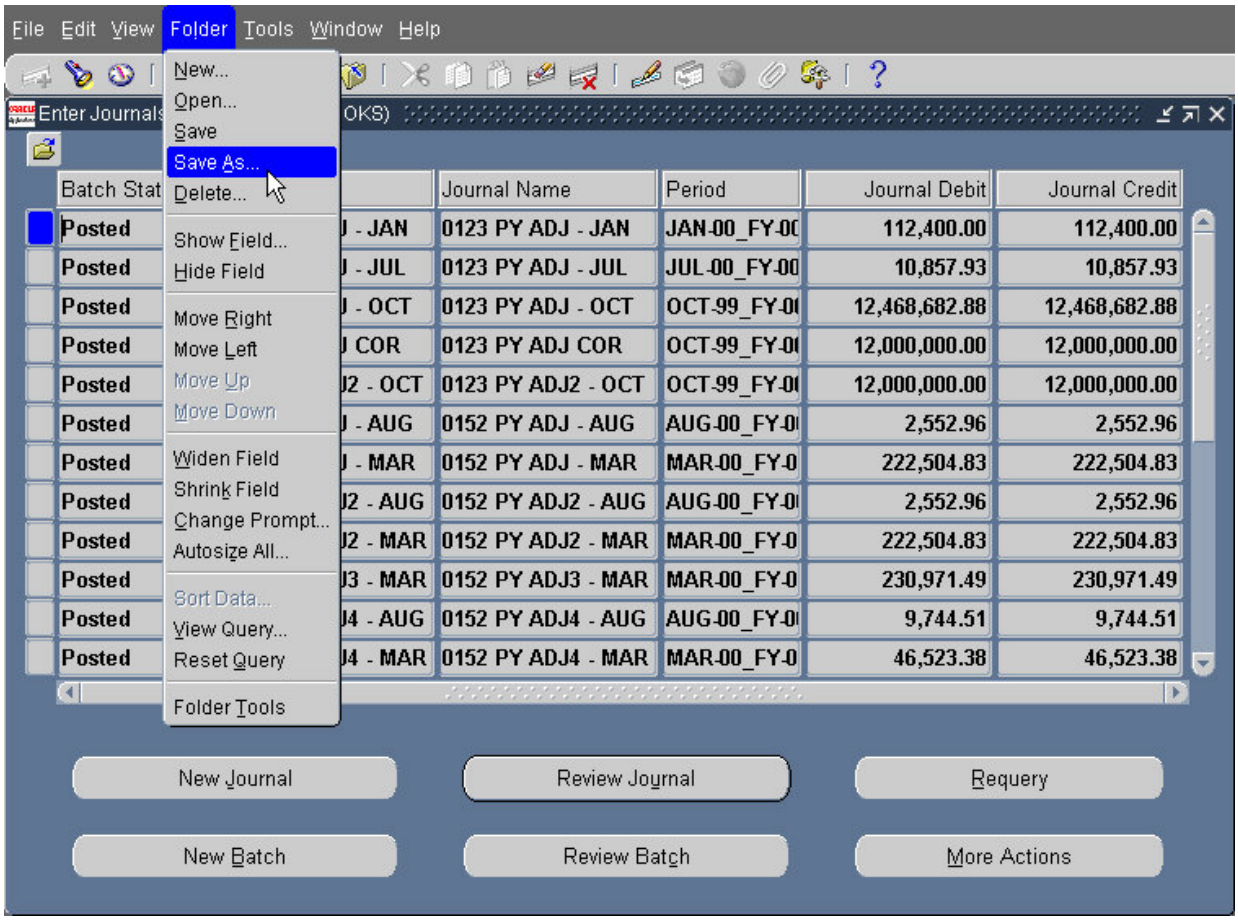
Defining Query Criteria for a Folder

One advantage of a folder is that you can customize it to display only the records you want to see. You can easily define and alter the query criteria for any folder and save that criteria in a folder definition.

1. Run the query that you want, either by using (M) View: Find or (M) View: Query-by-Example: Run. At least one record must be retrieved for the folder to memorize the query.



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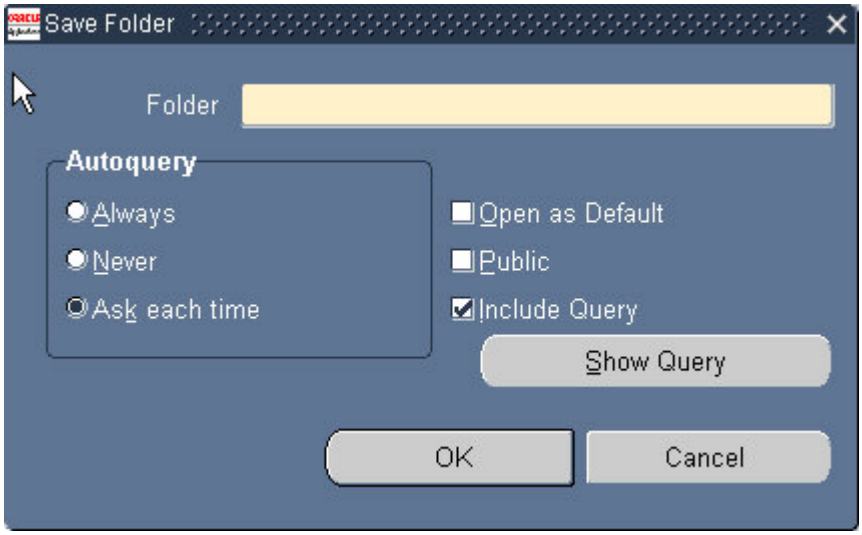
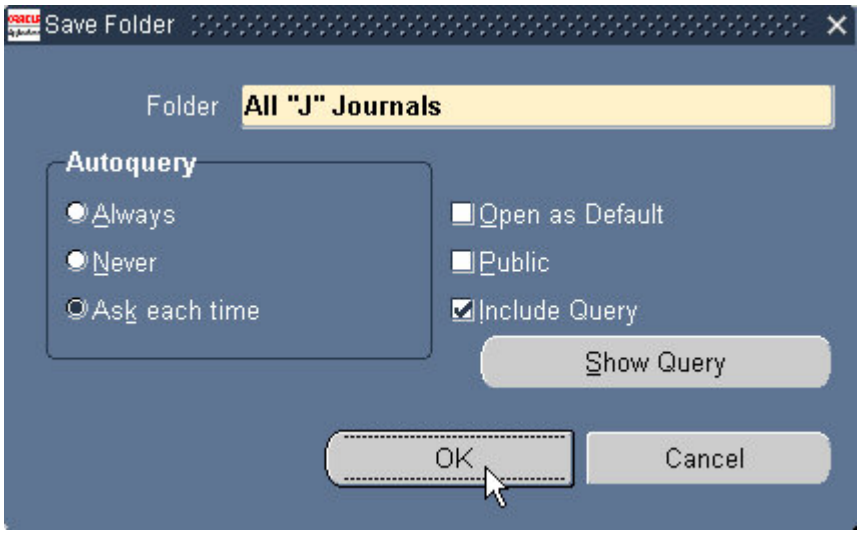


2. Enter a name for the folder definition.



3. Select the Auto Query frequency in which you want the folder to automatically query for a subset of records each time you open the folder definition (Always, Never, Ask each time) and select (B) OK.

Always The query will be automatically performed each time you open the folder.

Never The query will be saved with the folder, but will not automatically run when you open the folder.

Ask Each Time You will be prompted when you open the folder to decide if you would like the query to be performed immediately.

When you save a folder definition, the query criteria is "locked in" to the folder definition. When you perform another query on that same folder definition, you actually query on the subset of records. If you want to perform a new Query-by- Example on the complete set of records, reset the query for the folder definition.

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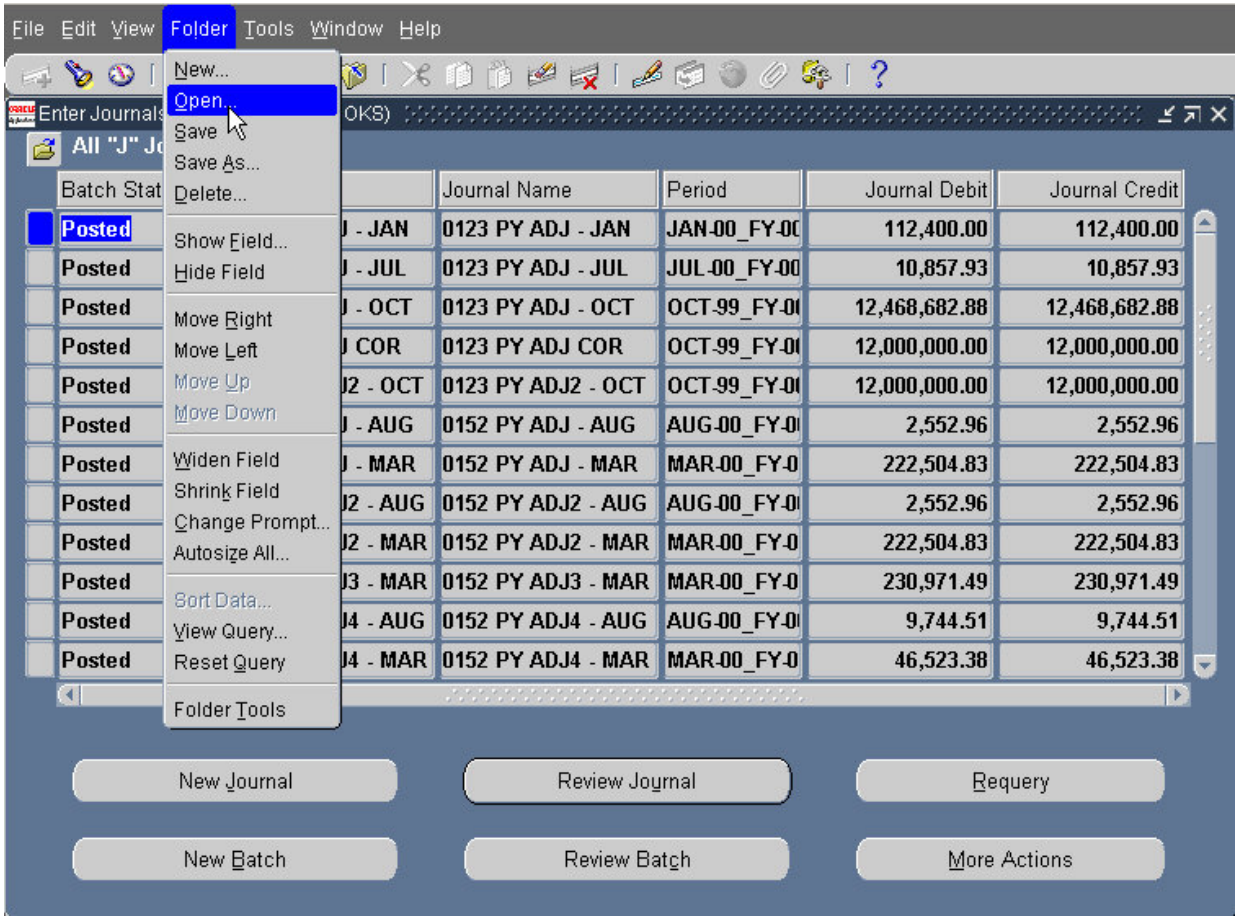
Opening a Folder



1. Select (M) Folder →Open.

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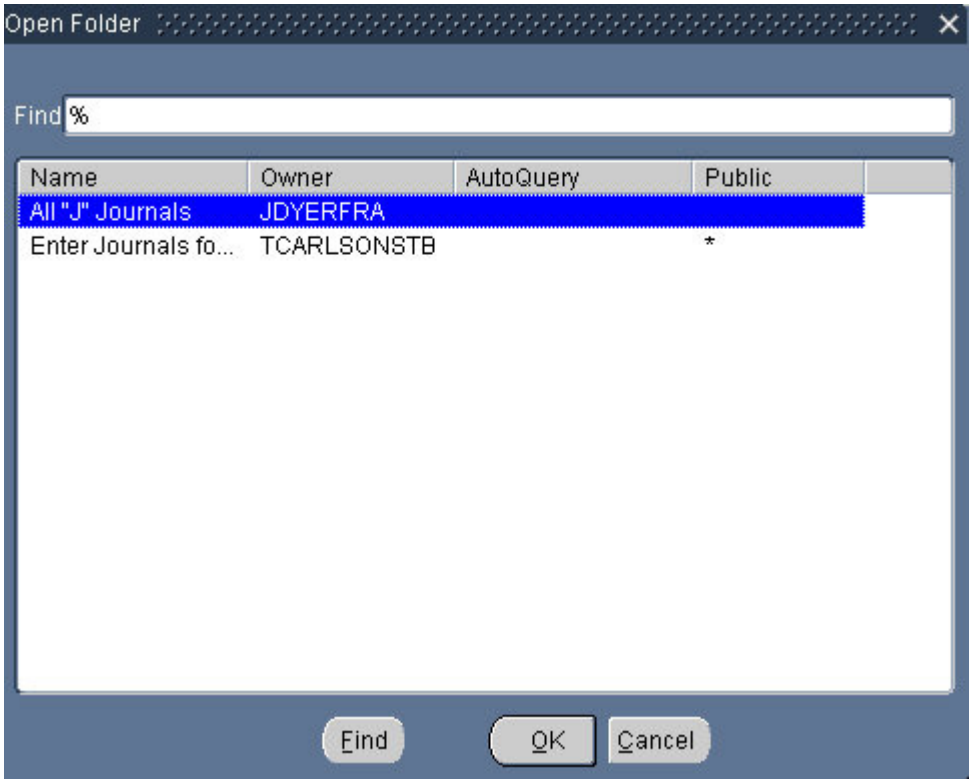

2. Find required Folder and select (B) OK.

3. A Decision screen will appear as follows:

4. Select (B) Yes.

Resetting the Query Criteria for a Folder Definition

1. Select (M) Folder → Reset Query.

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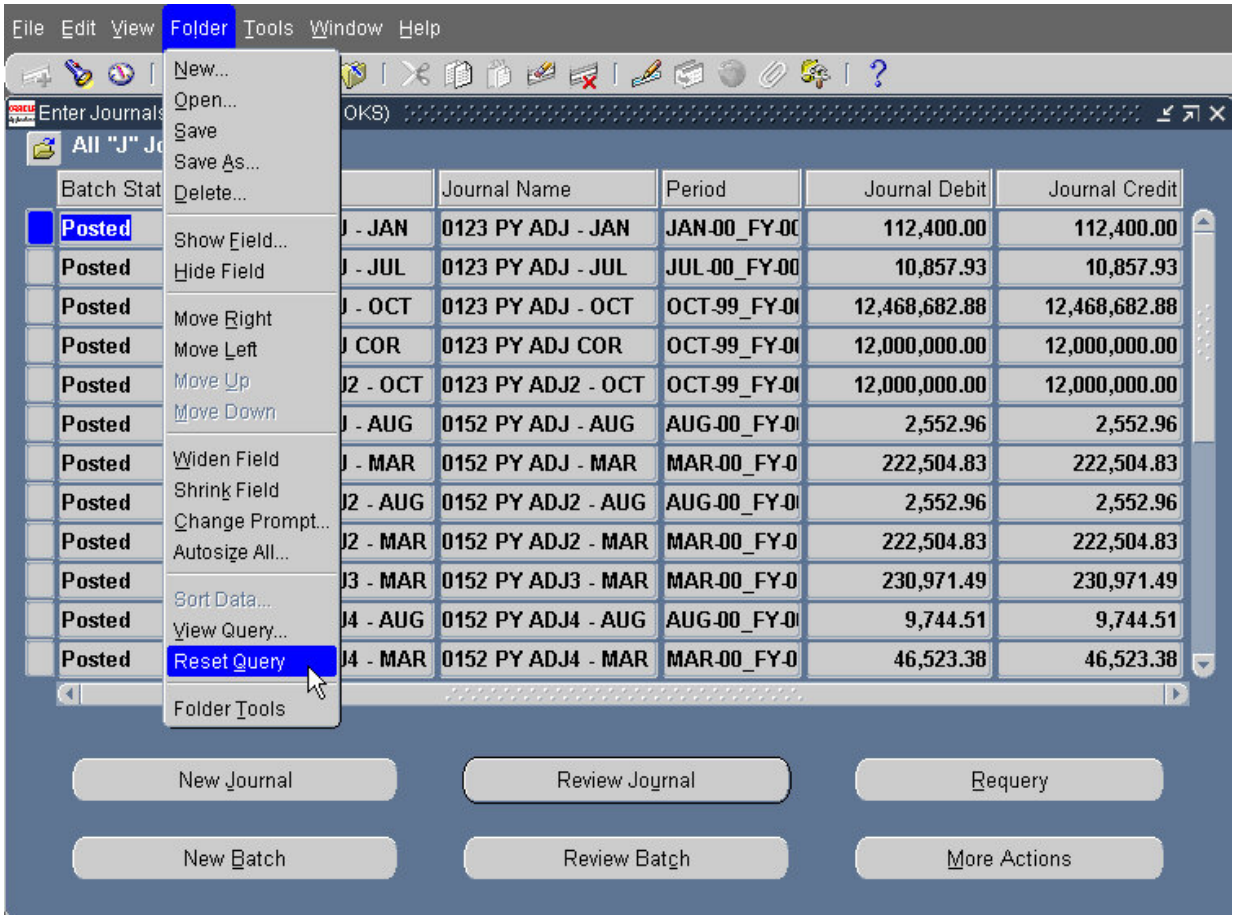
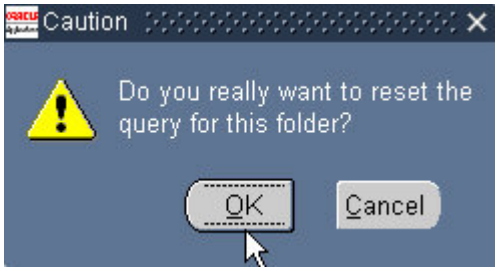


2. A Caution screen will appear.



3. To view the query criteria for a folder definition, select (M) Folder: View Query.

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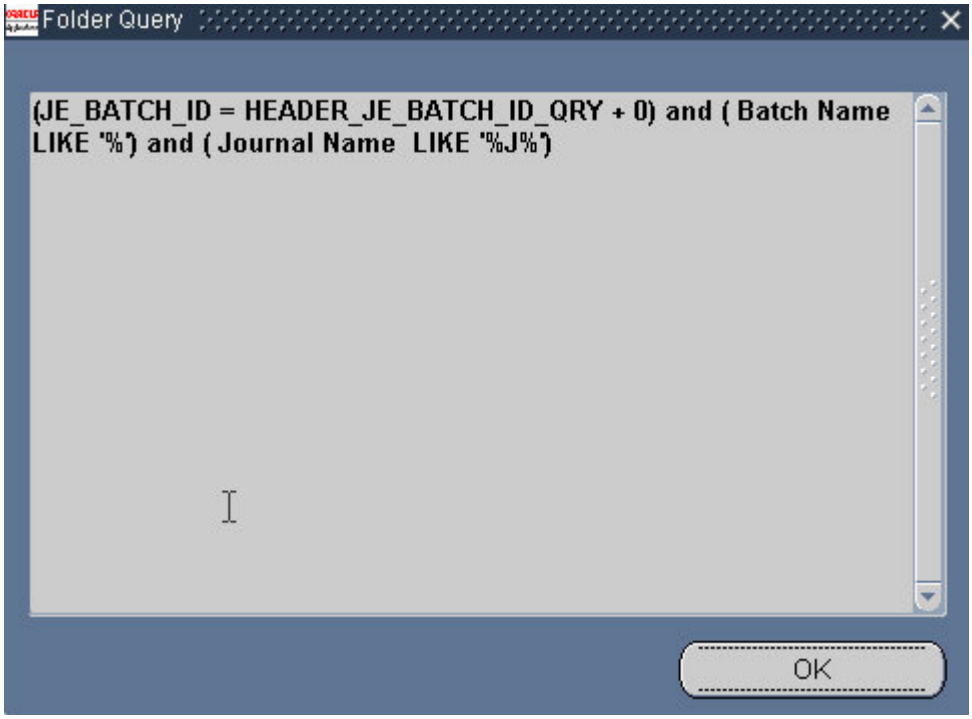
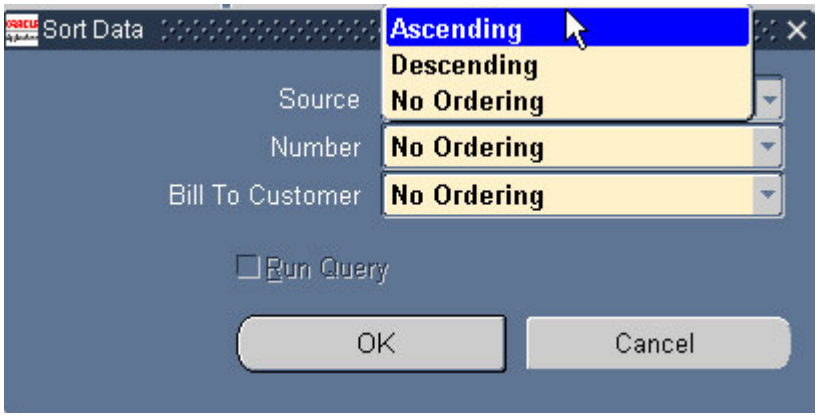


4. Perform another query and select (M) Folder: Save to save the new query to your current folder definition. To alter the sorting order of data in a multiple-record folder definition, select (M) Folder: Sort Data.

5. Select the down window button to switch the fields to any one of three settings.



Note: The Sort By option is not available for all forms

6. Select (M) Query: Run to rerun the query in your folder definition to apply any ordering changes to the records.

7. Select (M) Folder: Save or (M) Folder: Save As to save the query criteria to a folder definition.

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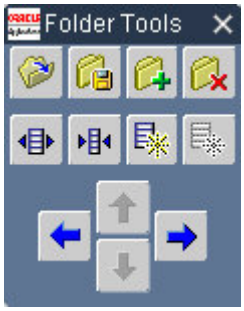
The Folder Tools

Oracle Applications
M → Folder → Folder Tools
Folder Tool Palette



Using Folder Tools

When you navigate to a folder block, the Folder Tools button becomes enabled on the Toolbar. Select this button to display the folder tool palette on your screen.

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Folder Tools Menu

You can customize the presentation of data in a folder using the Folder Tools menu.

Menu Item	Description
New	Creates a new folder definition
Open	Opens a saved folder definition
Save	Saves changes to the current folder definition
Save As	Saves the current folder definition to a new name
Delete	Deletes an existing folder definition
Show Field	Displays a field that is currently hidden
Hide Field	Hides the current field
Move Right	Moves the current field to the right
Move Left	Moves the current field to the left
Move Up	Moves the current field up (not always available)
Move Down	Moves the current field down (not always available)
Widen Field	Increases the width of the current field
Shrink Field	Decreases the width of the current field
Change Prompt	Changes the prompt for the current field
Autosize All	Adjusts all field widths proportionately to fill the window (This cannot be undone without resizing each window.)
Sort Data	Toggles the display of the Order By Buttons so you can specify the sort order for the first three field columns
View Query	Displays the query criteria for the current folder definition
Reset Query	Erases the current query criteria
Folder Tools	Displays the folder tool palette

The menu items highlighted above correspond to the Folder Tool palette icons.

Customizing the Layout of a Folder

The Folder menu and folder tools provide you with many options to help you customize your folder layout. Some of these tasks may also be performed using your mouse directly on the fields you wish to change. You can change the width, sequence, prompts and the order of the data of a field using your mouse. For example, to change a prompt, position your cursor over the prompt and click your right mouse button. This displays a dialog box for making your change. To toggle the sorting of a row from ascending to descending or vice versa use your left mouse button and click once on the prompt.

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Note: Some Folder menu items are not available when you are in Enter Query mode.

To show a hidden field:

- Choose **Show Field** from the Folder menu to display a list of currently undisplayed fields.

- Select a value from the list and choose **OK** to display the field in the folder layout.
  The new field is inserted after the current field, and the cursor moves to the new field.

To hide a field:

- Choose **Hide Field** from the Folder menu to remove the current field from the folder layout.
  Your cursor moves to the field sequenced after the field that was removed.

To move a field to the right:

- Choose **Move Right** from the Folder menu.
  In a multi-record block, this swaps the position of the current field with the field to its right. In a single-record block, this moves the current field one character-width to the right.

To move a field to the left:

- Choose **Move Left** from the Folder menu.
  In a multi-record block, this swaps the position of the current field with the field to its left. In a single-record block, this moves the current field one character-width to the left.

To move a field up in a single-record block:

- Choose M**ove Up** from the Folder menu.
  This moves the current field one character-height up.

To move a field down in a single-record block:

- Choose **Move Down** from the Folder menu.
  This moves the current field one character-height down.

To widen a field:

- Choose **Widen Field** from the Folder menu.
  This increases the width of the current field by a 0.2 inch increment, up to a maximum width of 20 inches.

To shrink the width of a field:

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- Choose **Shrink Field** from the Folder menu.
  This decreases the width of the current field down to a minimum width of 0.2 inches.

To autosize all the fields of a folder:

- Choose **Autosize All** from the Folder menu.
  Resizes displayed fields based on a sample of values for the fielding the block, ensuring that no field is smaller than the width of it's prompt. The number of records (sample of values) is determined by selecting one of three options: 10, 50, or 100 in the decision window.

To rename a field prompt:

- Choose **Change Prompt** from the Folder menu.

- Enter a new prompt name in the **Alter Prompt** window that appears. If you precede a prompt name with a hyphen, '-', and you choose to show the field in the folder, the field appears without a prompt.

- Choose **Default** if you wish to recover the original prompt name for the field.

- Choose **OK** when you are done.

Attention: Shorten or abbreviate a prompt name rather than change it altogether. This ensures consistency with the similar prompt names that appear in the non-folder windows of your application.

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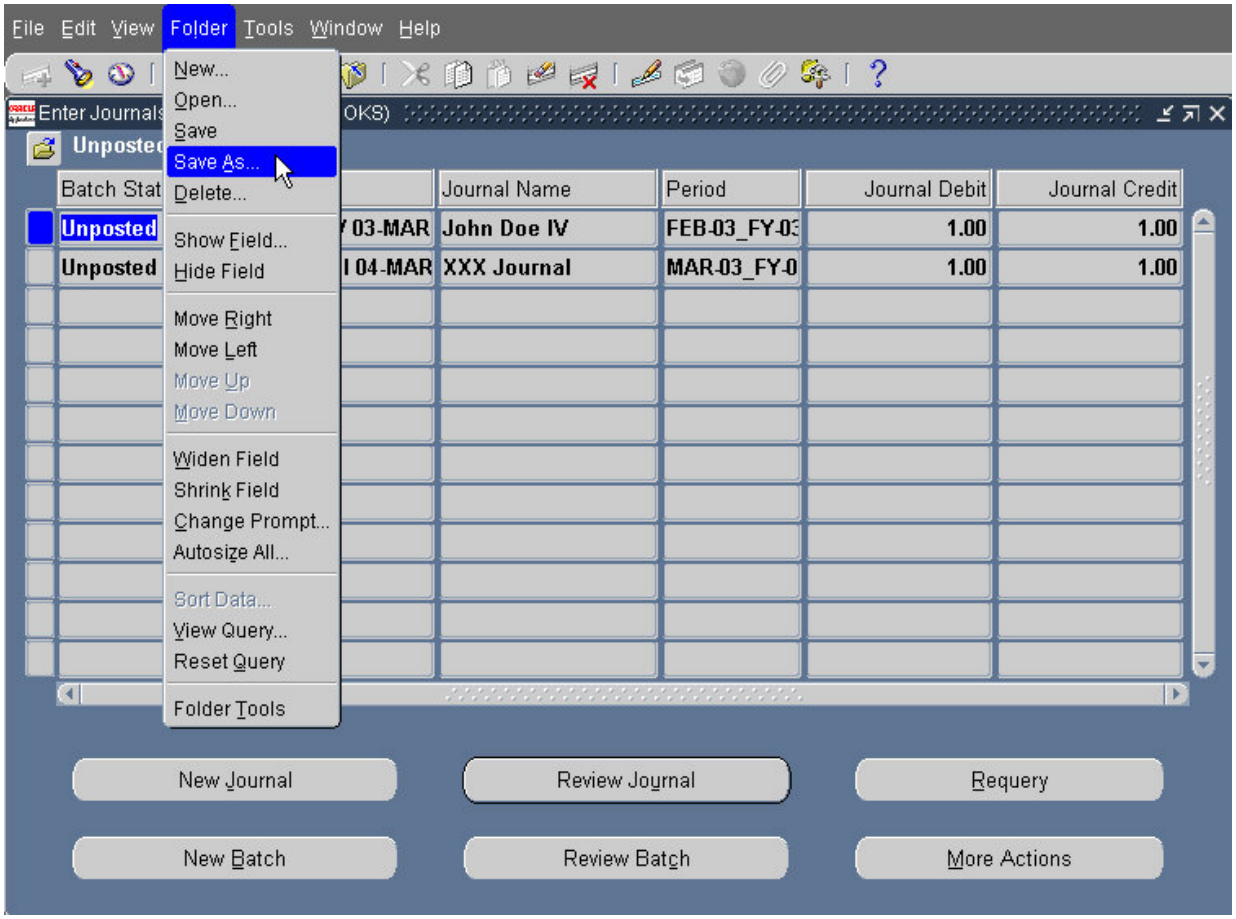
Toolbar

Oracle Applications
M → Folder → Save As
Toolbar



Recovering the Original Default Folder Definition for a Folder

Once you create a custom folder definition and make it the default, you can recover the original default folder definition shipped with the product. Note that if you like the original default folder definition, give it a name and save it (without making any changes) before you create any new folder definitions. This way, you can open the original folder definition by choosing it from a list of all your predefined folder definitions.

How to Recover the Original Default Folder Definition

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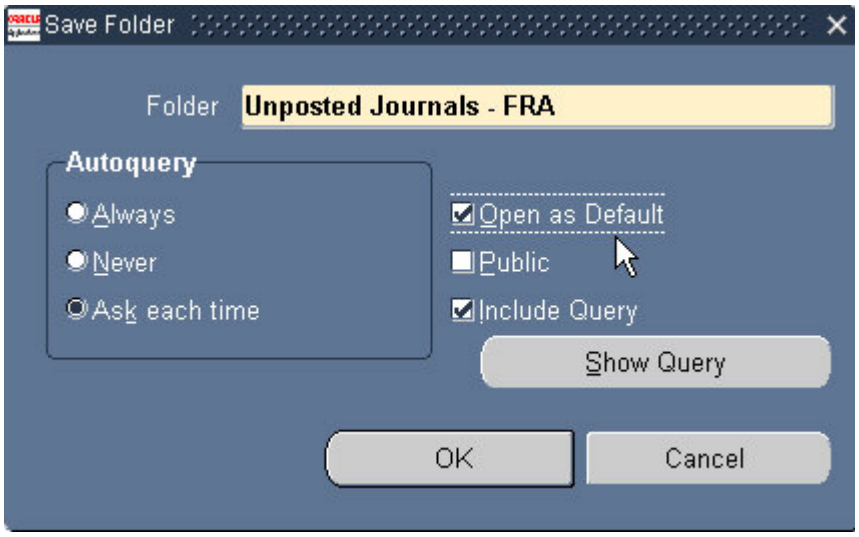
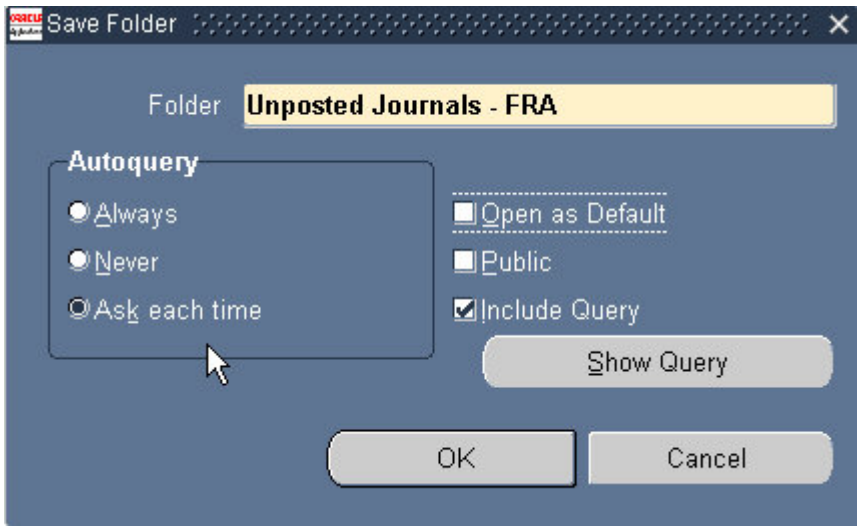
1. Select (M) Folder: Save As.



2. Clear Open as Default in the Save Folder window.



3. Select (B) OK when you are finished.

4. Navigate to this folder again to display the original default folder definition.

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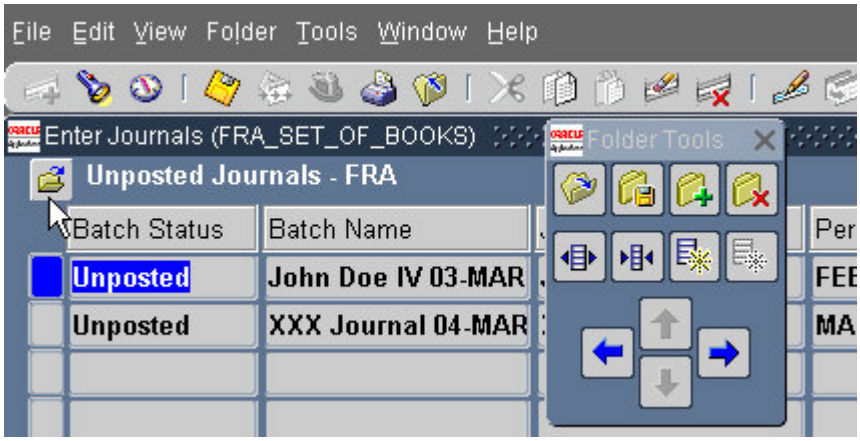
Opening and Saving a Folder Definition

Toolbar

Oracle Applications
M → Folder → Open *or* Save *or* Save As
Toolbar



To Open Another Folder Definition

1. Select (M) Folder: Open to load a predefined folder definition. Or, select (B) Open Folder located in the upper left corner of the folder block, located in folder tools. Or, use the open folder icon located in the upper left corner of your open folder screen.

2. Select a private or public folder definition from the list window that is displayed, and select (B) OK to replace the current folder definition with the new folder definition.

To Save Changes to a Folder Definition

1. Select (M) Folder: Save to save any layout or query changes made to the current folder definition or choose (M) Folder: Save As to save the current folder definition under a new name. If there are any pending changes to the information in the folder, you will be prompted to commit the changes.

2. Select (B) OK after you have completed the information requested in the Save Folder window.

If you save a folder definition to Open as Default and then open another folder definition and save that second definition also as Open as Default, the second definition is reset as the new default.

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If you modify a public folder definition in any way, saving it makes it a private folder definition.

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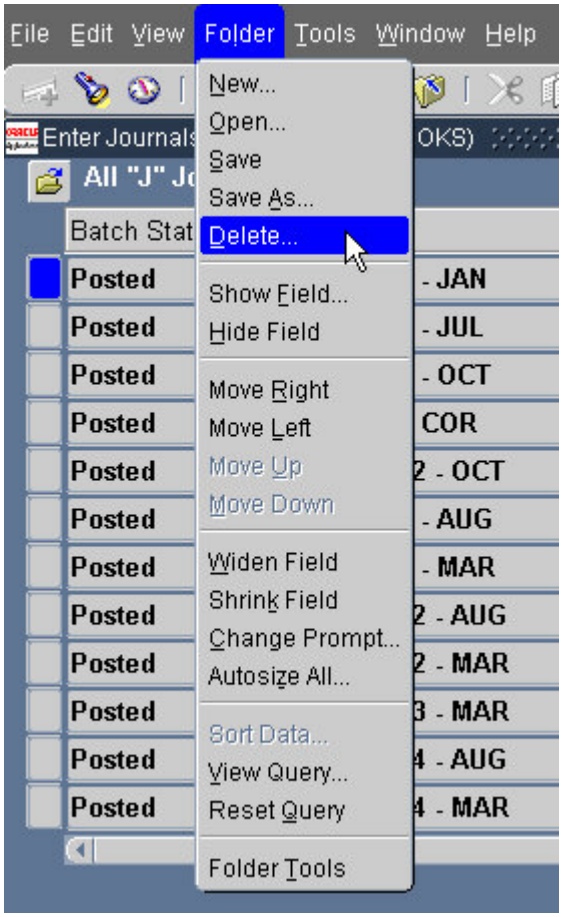
Deleting a Folder Definition

Toolbar

Oracle Applications
M → Folder → Delete
Toolbar



Deleting a Folder Definition

1. Select (M) Folder: Delete.

2. Select a folder definition from the list that is displayed and select OK to delete the definition. Note that you can only delete folders you have created. If another user is referencing that folder definition as their Open as Default folder, that reference is deleted as well.

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Summary

- The Navigator window
  - Documents alternative region
- Folder definitions and utilization.

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Lab 1: Customizing the Presentation of Data

1. Save a Document to your Navigator window.

   Use Responsibilities to FRA GL Systems Accountant.

   Navigate to the Enter Journals Window to enter a new journal.

   Type Your Name and Test followed by the last 3 digits of your phone number (example Suzanne's Test123) in the Journal field. Use the category "addition".

   Save your partially completed journal.

   From the Toolbar menu, select "Place on Navigator" to save this unfinished document to your Navigator window.

   View your Navigator window and the documents saved to it.

   Use the tabs and to switch to the Functions of the Navigator window.

2. Create a Folder for the Customer Summary window.

   Change Responsibilities to AR DELPHI Controller.

   Navigate to the Customer Summary window.

   Use Query Find to bring display all customers in the Customer Summary window.

   Using the Toolbar menu for Folder, create a new Folder and use your name for the folder title.

   Hide the Alternate Name and Taxpayer ID fields.

   Put the Customer Number as the first field to show on the left of the form.

   Save your folder.

   Return to the Navigator window to navigate back to the Customer Summary window and view it using your newly created folder definition.

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Lab 1 Solutions: Customizing the Presentation of Data

1. Save a Document to your Navigator window.

   Change Responsibilities to **FRA GL Systems Accountant**.

   Select FRA GL Systems Accountant from the responsibilities list.

   Navigate to the Enter Journals Window to enter a new journal.

   N → Journals → Enter

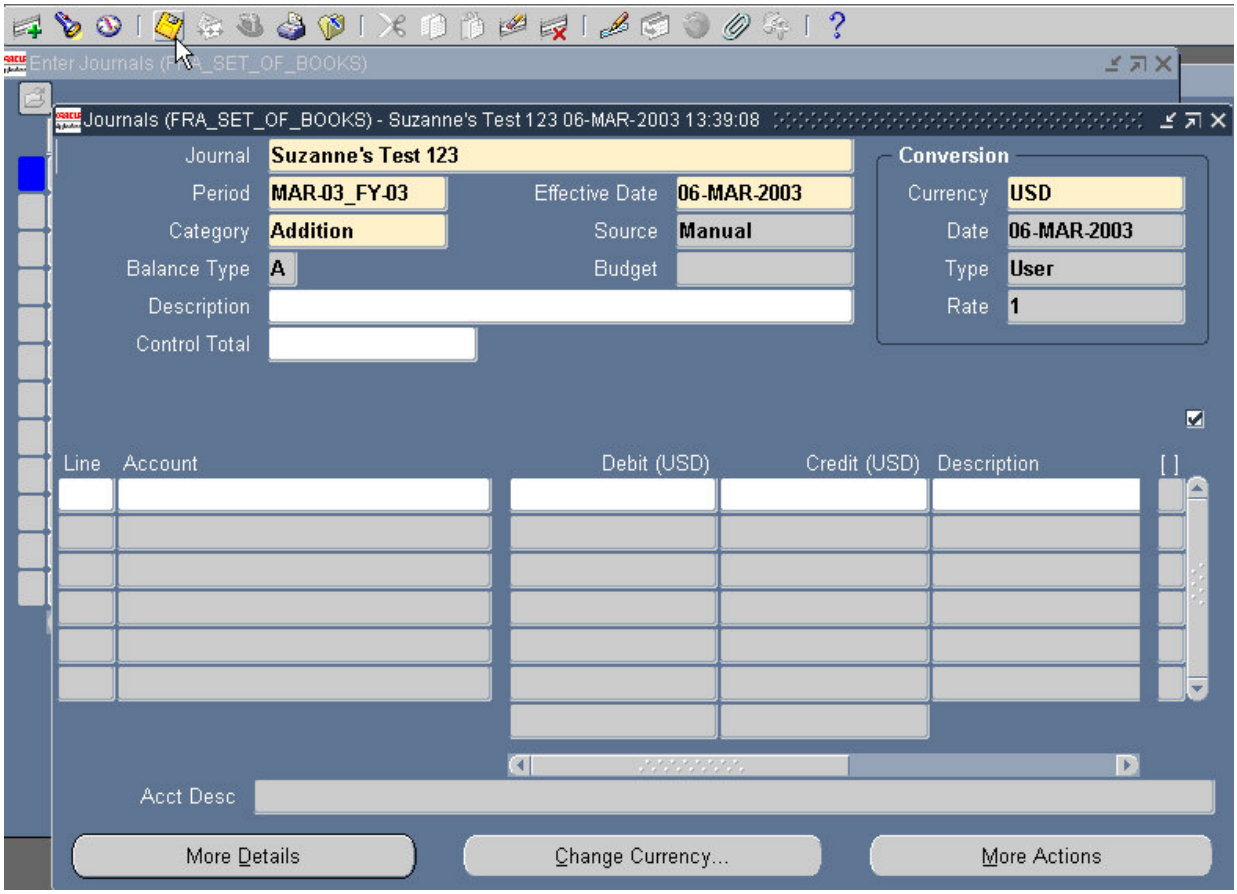
   Close the Find Window.

   Select New Journal.

   Type Your Name and Test followed by the last 3 digits of your phone number (example Suzanne's Test123) in the Journal field.

   Save your partially completed journal.

   Verify that your window appears similar to the one displayed below.



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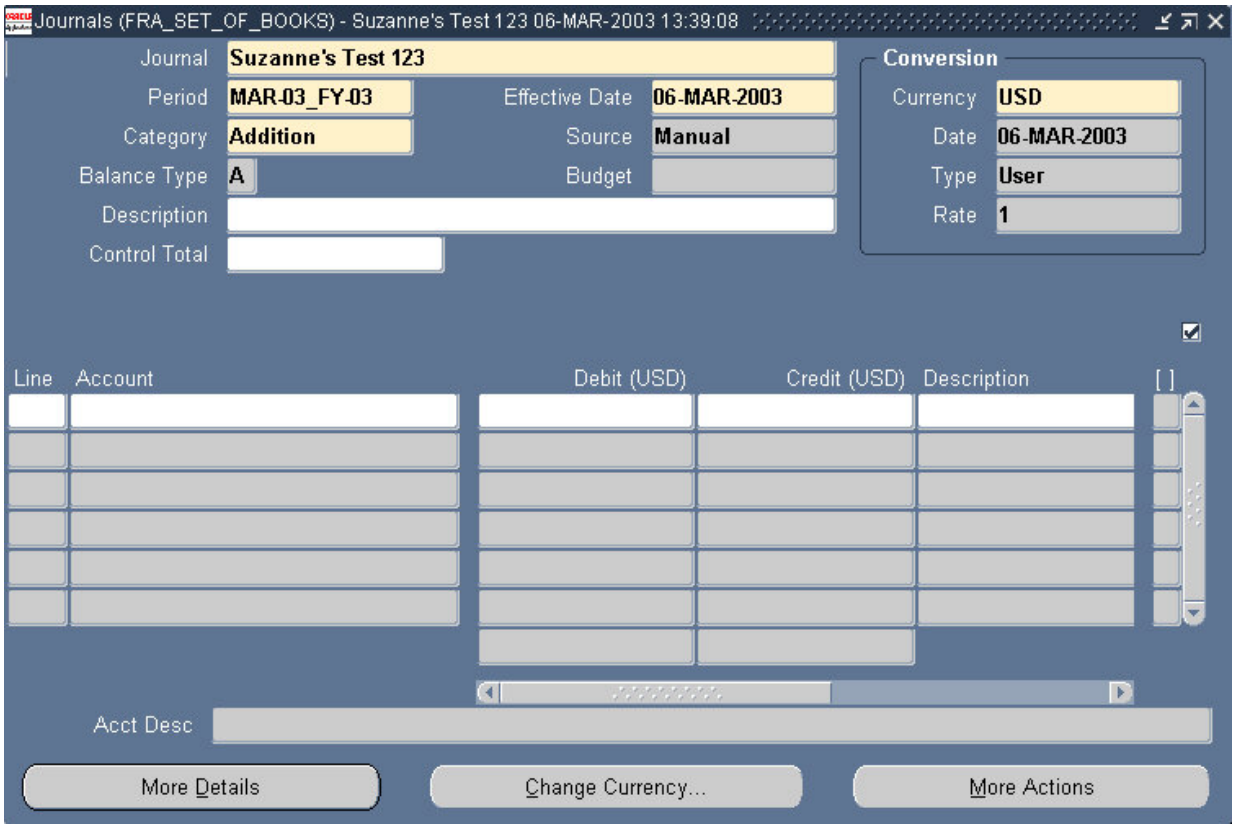
Select Save on the Toolbar to save this journal.

Do not close your window, you will use this form in the next step of this lab.

From the Toolbar menu, select File → Place on Navigator to save this unfinished document to your Navigator window.



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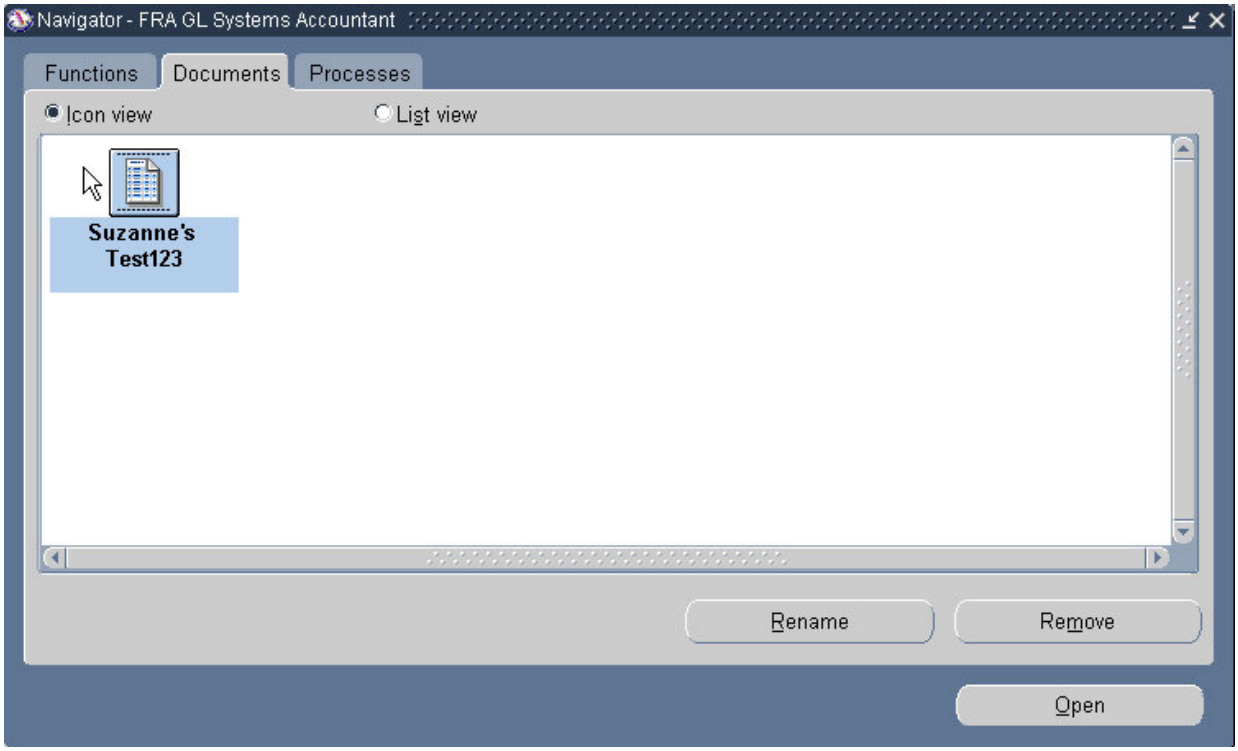
Lab 1 Solutions: Customizing the Presentation of Data

View your Navigator window and the documents saved to it.

Select the (I) Show Navigator from your toolbar.

Select the Documents tab.

Verify that your window appears similar to the following.



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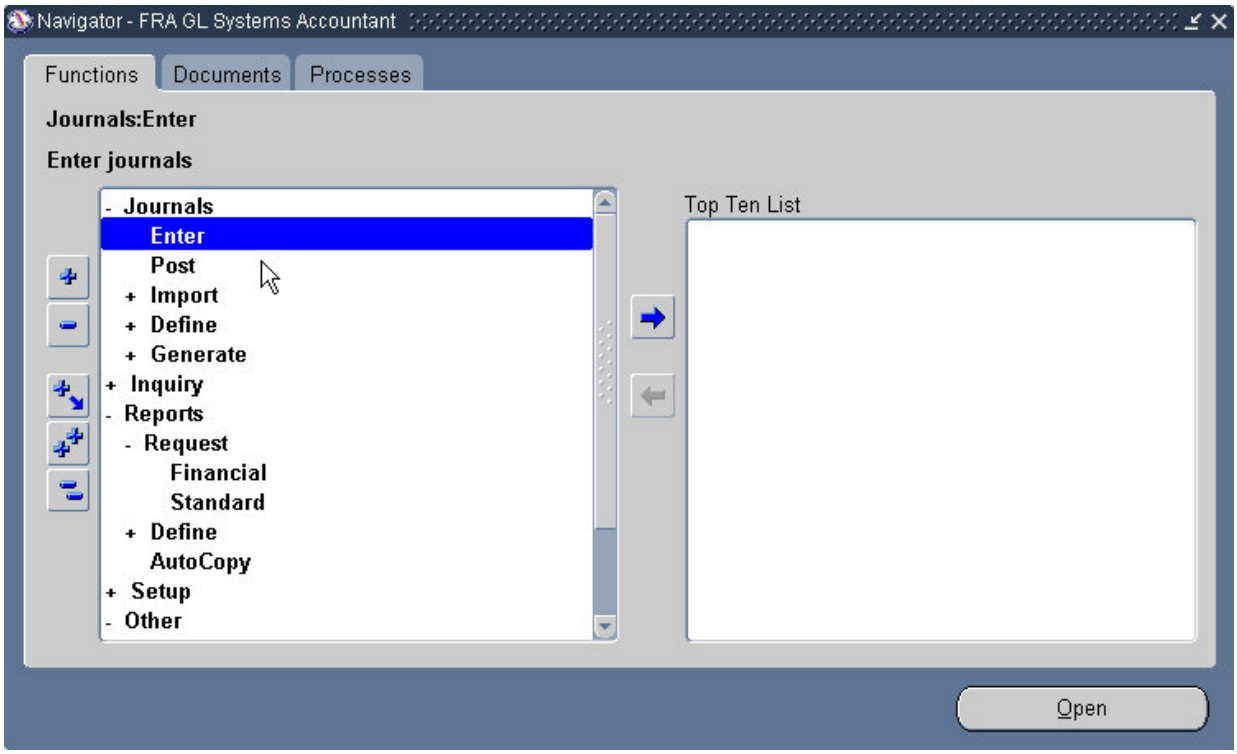
2. Create a Folder for the Enter Journals window.

   Change Responsibilities to **FRA GL Systems Accountant**.

   Select FRA GL Systems Accountant from the responsibilities list.

   Navigate to the Enter Journals window.

   N → Journals → Enter



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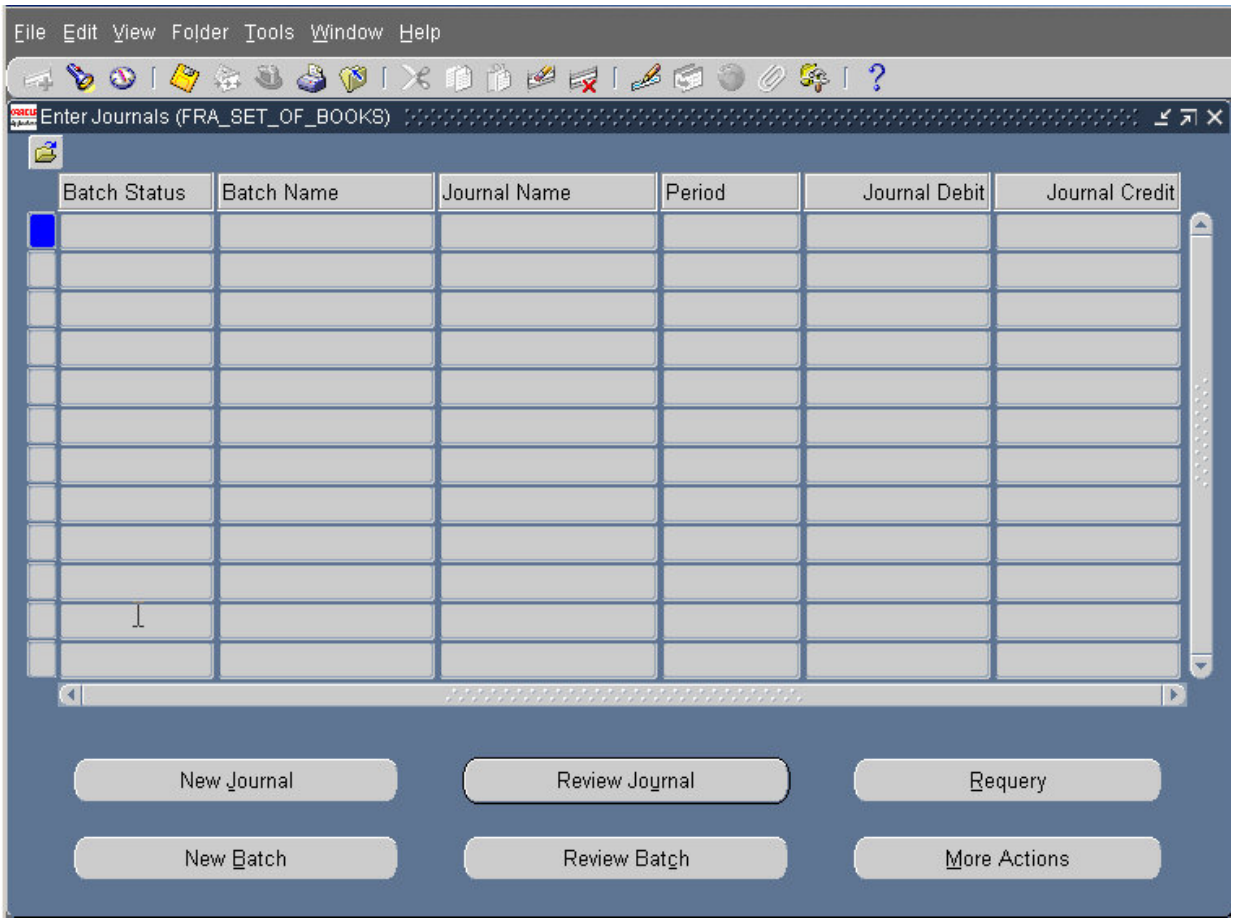
Close the Find Journals window.

Verify that your window appears similar to the one displayed below.



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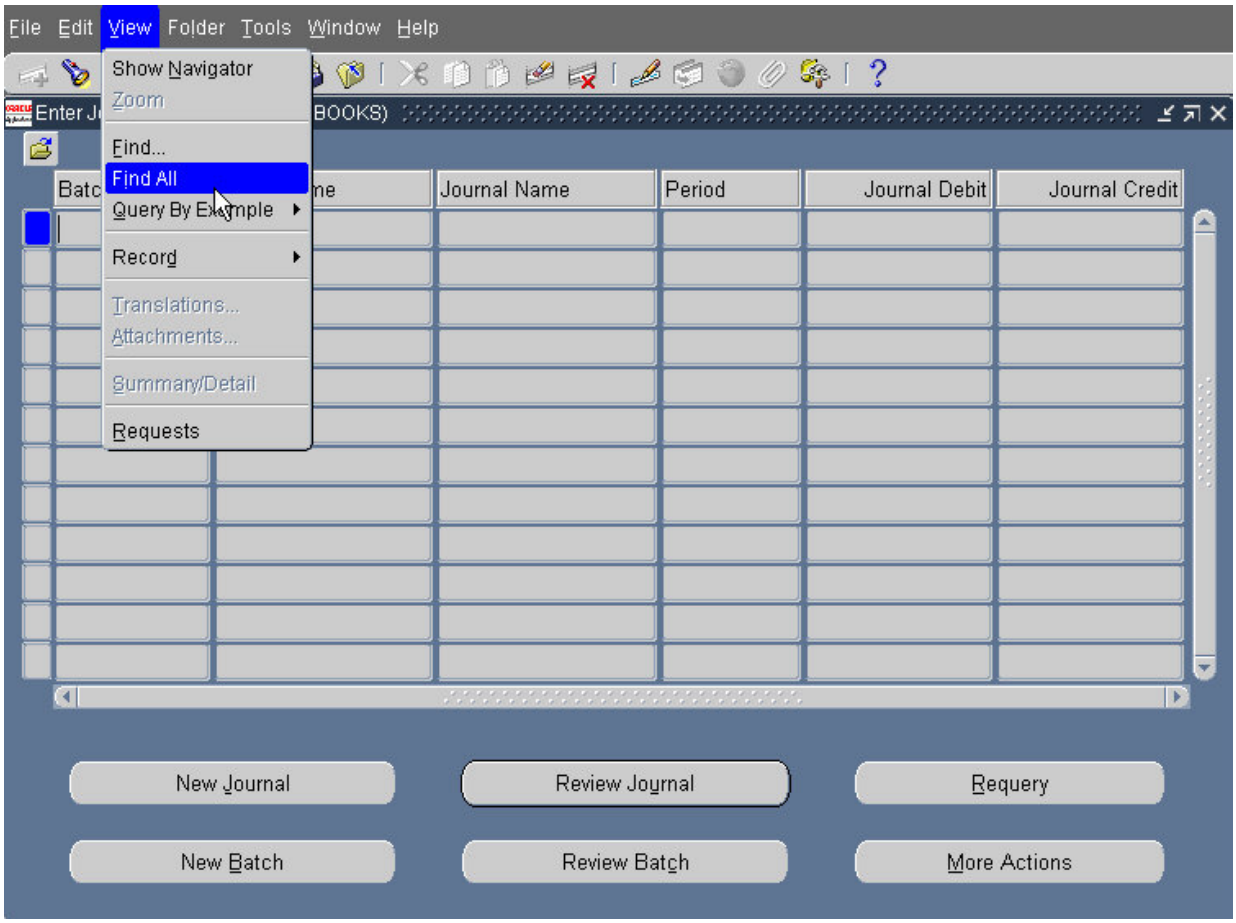
From the Toolbar menu, select M → View → Find All



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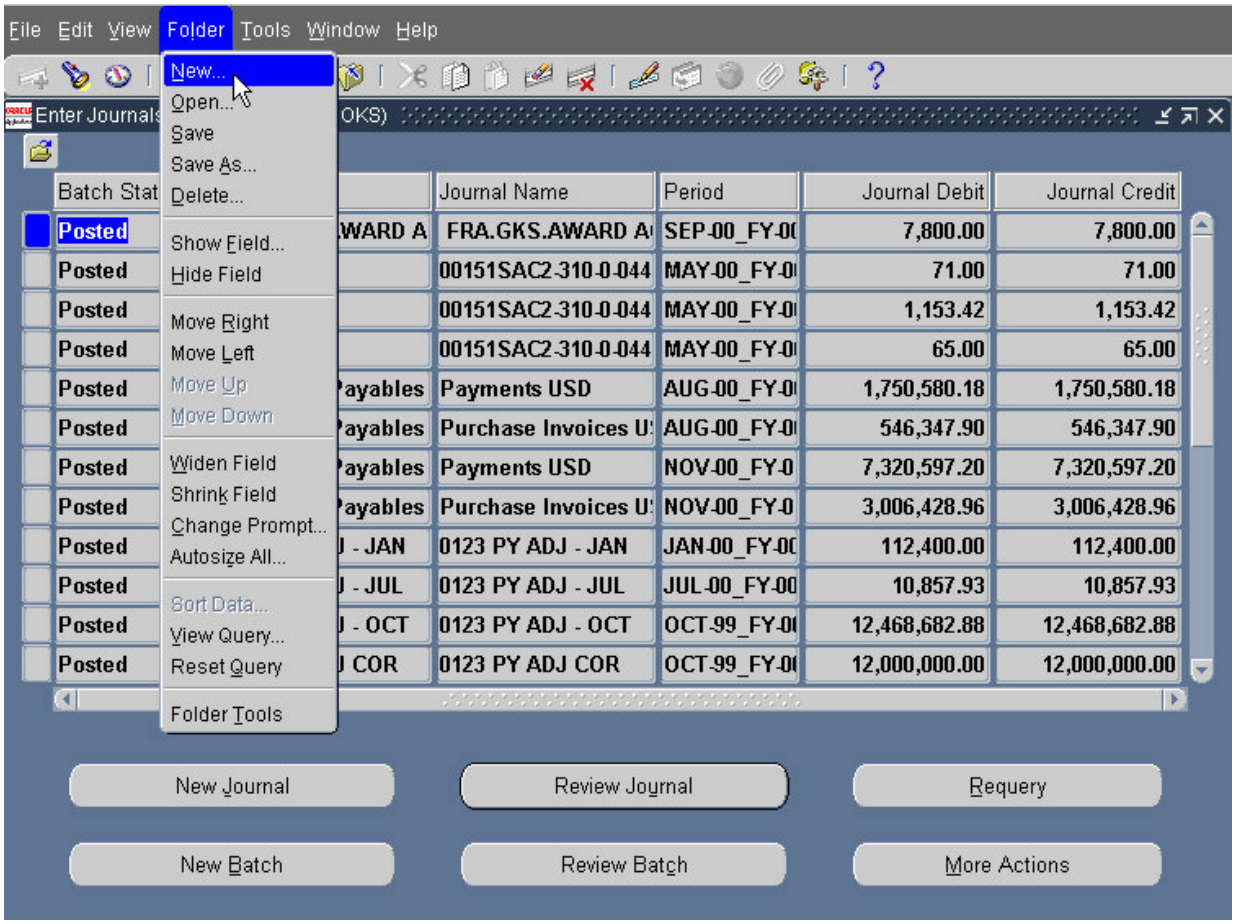
Lab 1 Solutions: Customizing the Presentation of Data

Verify that your window appears similar to the one displayed below.



Using the Toolbar menu for Folder, create a new Folder and use your name for the folder title.

Select M → Folder → New from the Toolbar menu.

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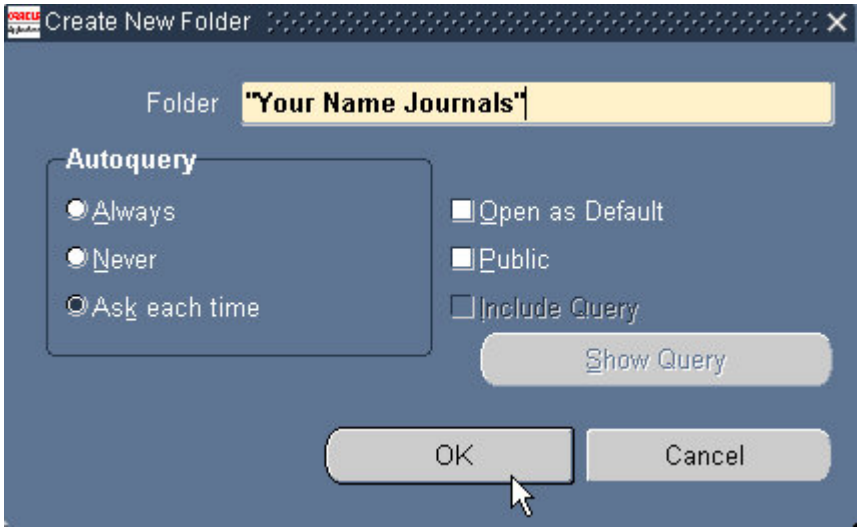
In the Folder field, type in "Your Name Journals" as the name of the folder definition.

Accept the default values of the other fields in the window.



Select (B) OK.

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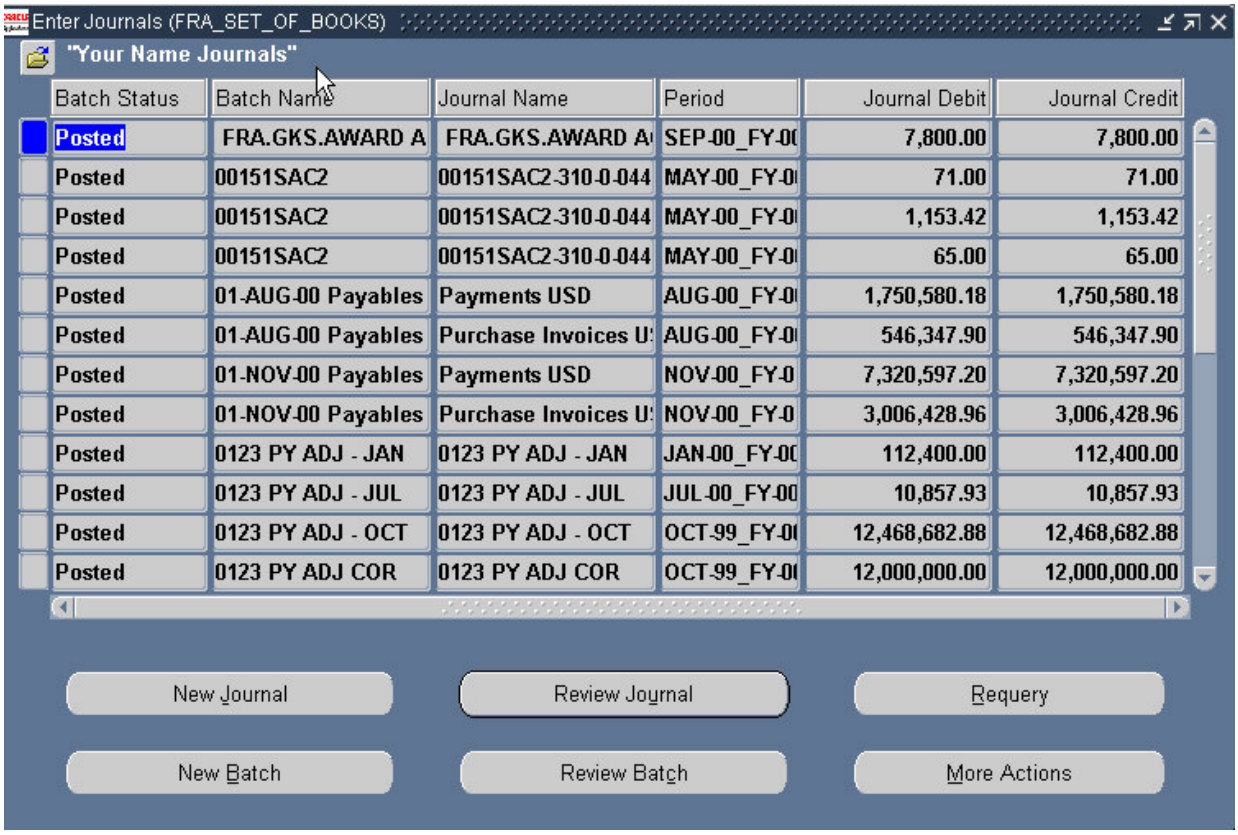
Lab 1 Solutions: Customizing the Presentation of Data

Verify that your window appears similar to the one displayed below.



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Lab 1 Solutions: Customizing the Presentation of Data

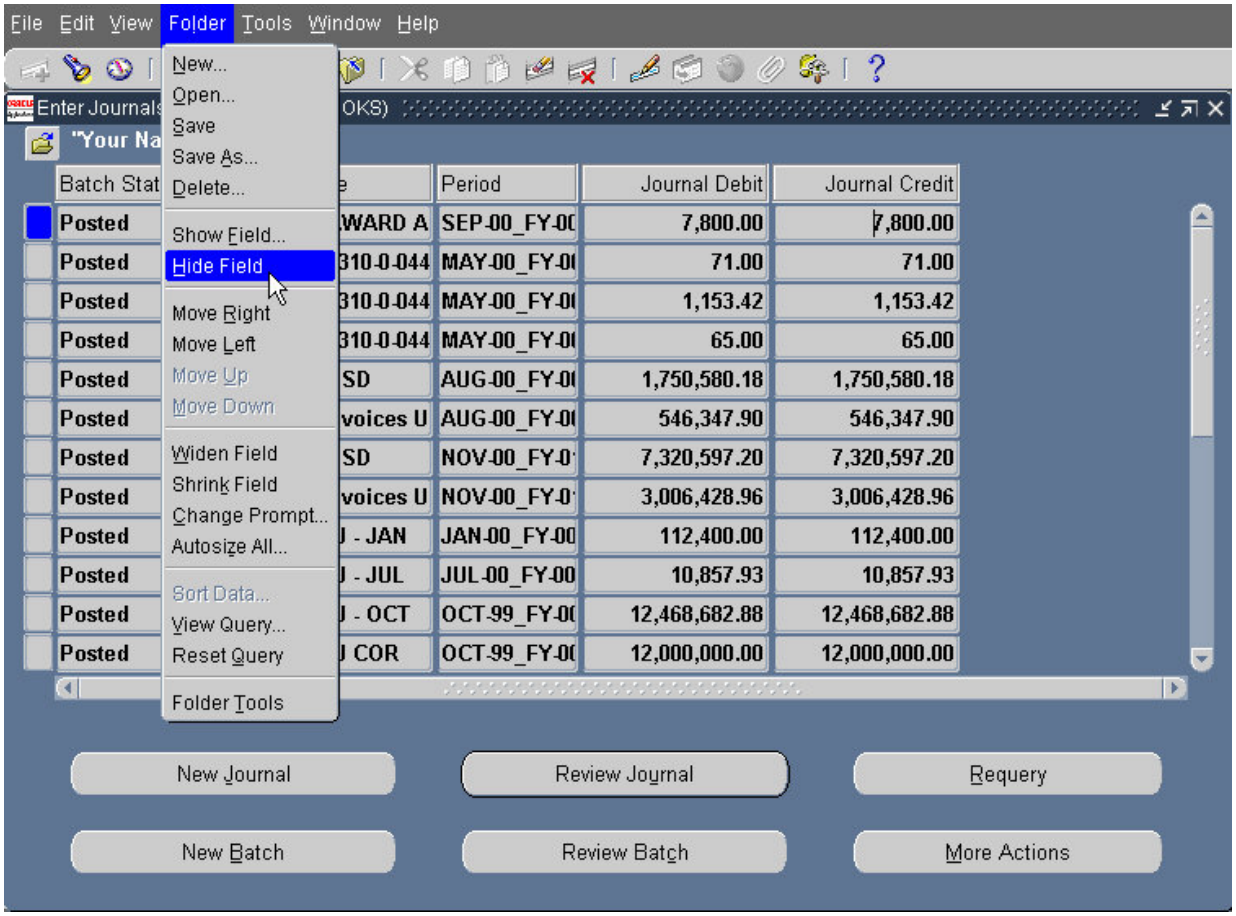
Hide the Batch Name and Journal Credit fields.

Use the mouse to place the cursor in the Batch Name field.

Select M → Folder → Hide

Use the mouse to place the cursor in the Journal Credit field.

Select M → Folder → Hide



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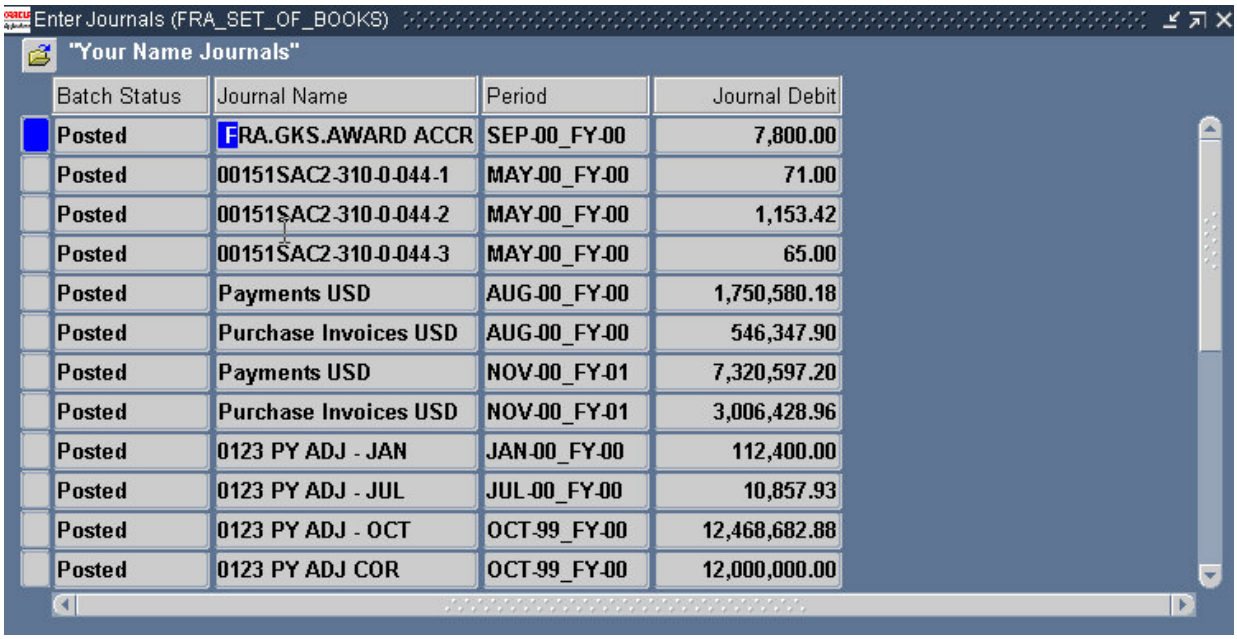
Lab 1 Solutions: Customizing the Presentation of Data

Verify that your window appears similar to the one displayed below.



Batch Status	Journal Name	Period	Journal Debit
Posted	FRA.GKS.AWARD ACCR	SEP-00_FY-00	7,800.00
Posted	00151SAC2-310-0-044-1	MAY-00_FY-00	71.00
Posted	00151SAC2-310-0-044-2	MAY-00_FY-00	1,153.42
Posted	00151SAC2-310-0-044-3	MAY-00_FY-00	65.00
Posted	Payments USD	AUG-00_FY-00	1,750,580.18
Posted	Purchase Invoices USD	AUG-00_FY-00	546,347.90
Posted	Payments USD	NOV-00_FY-01	7,320,597.20
Posted	Purchase Invoices USD	NOV-00_FY-01	3,006,428.96
Posted	0123 PY ADJ - JAN	JAN-00_FY-00	112,400.00
Posted	0123 PY ADJ - JUL	JUL-00_FY-00	10,857.93
Posted	0123 PY ADJ - OCT	OCT-99_FY-00	12,468,682.88
Posted	0123 PY ADJ COR	OCT-99_FY-00	12,000,000.00

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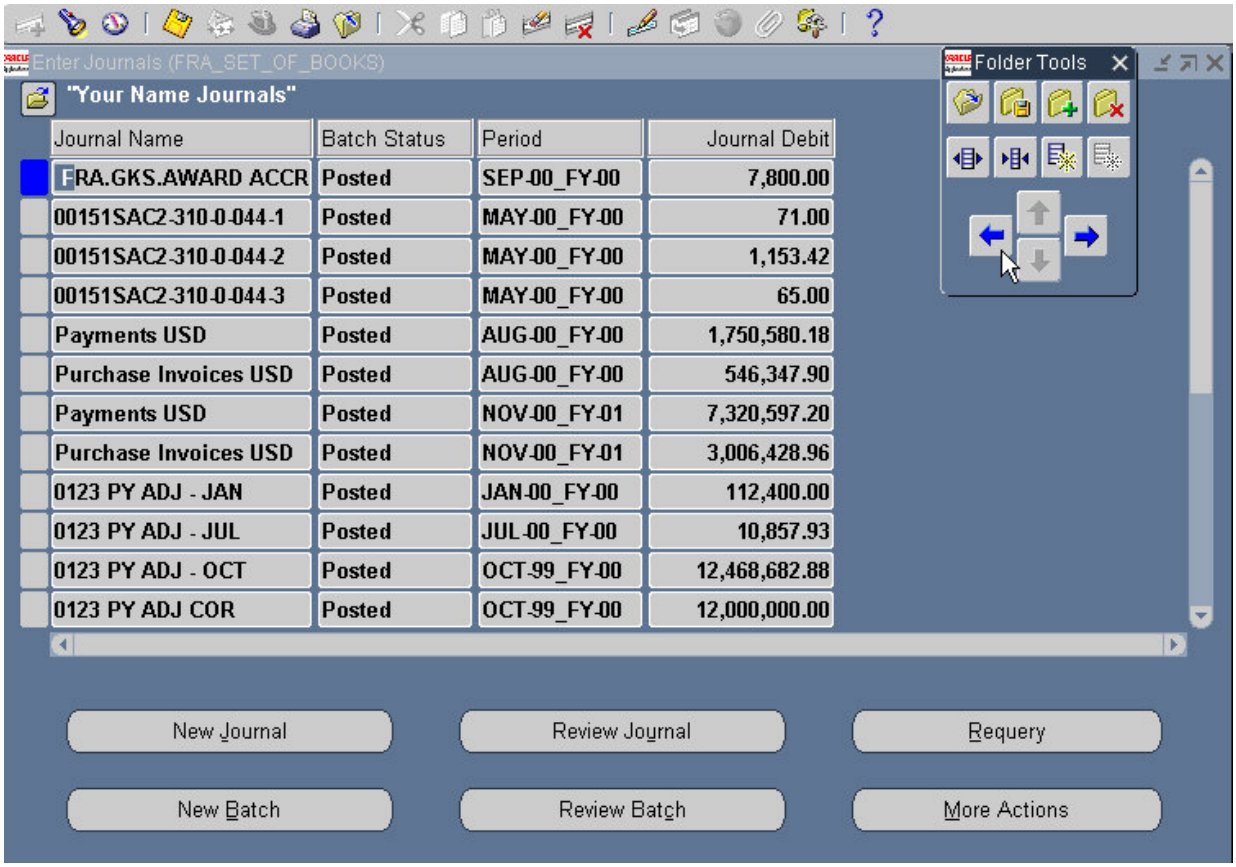
Lab 1 Solutions: Customizing the Presentation of Data

Put the Customer Number as the first field to show on the left of the form.

Use the mouse to place the cursor in the Journal Name field.

Use the Move Left on the Folder Tool palette to move it to the first column on the left of the form.



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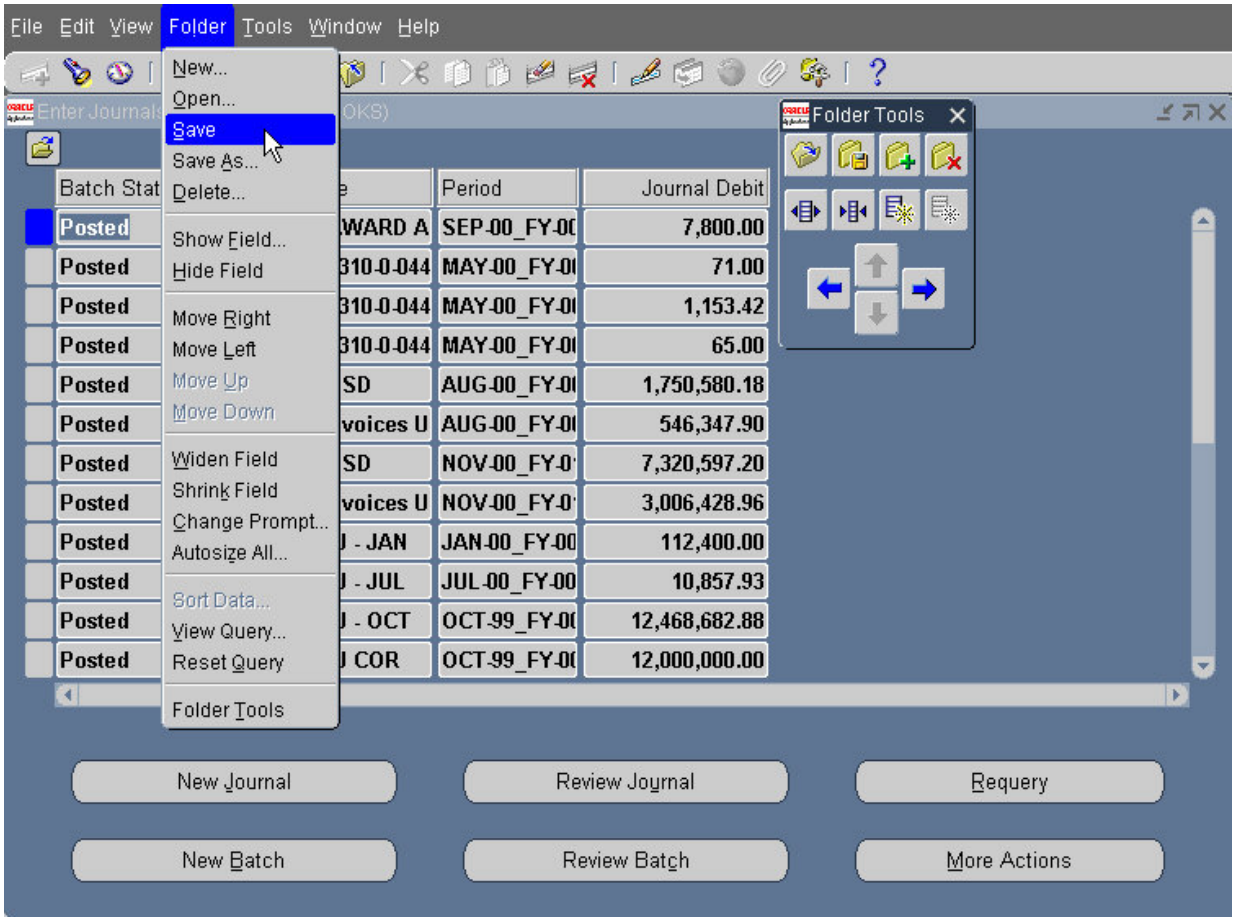
Save your folder.

Select M → Folder → Save



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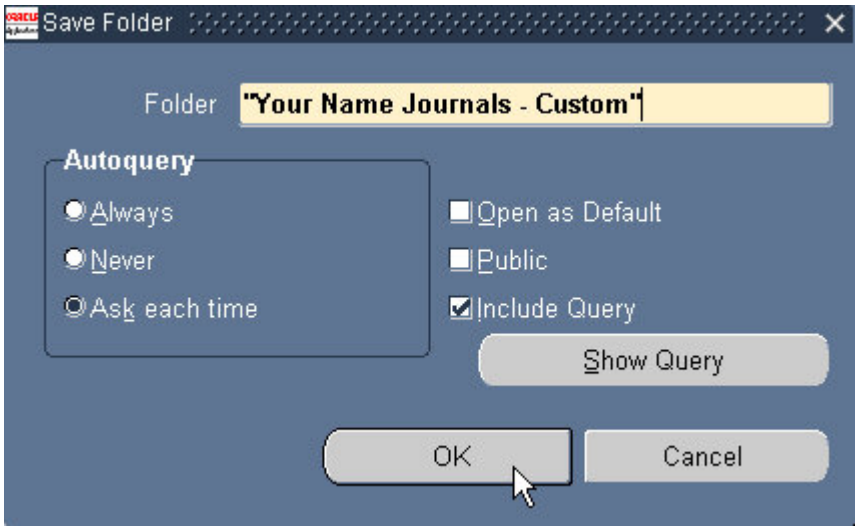
Enter "Your Name Journals - Custom" in the Folder field in the Save Folder window.



Select (B) OK.

Close the form. Select (M) Window to verify all windows are closed except your navigator.

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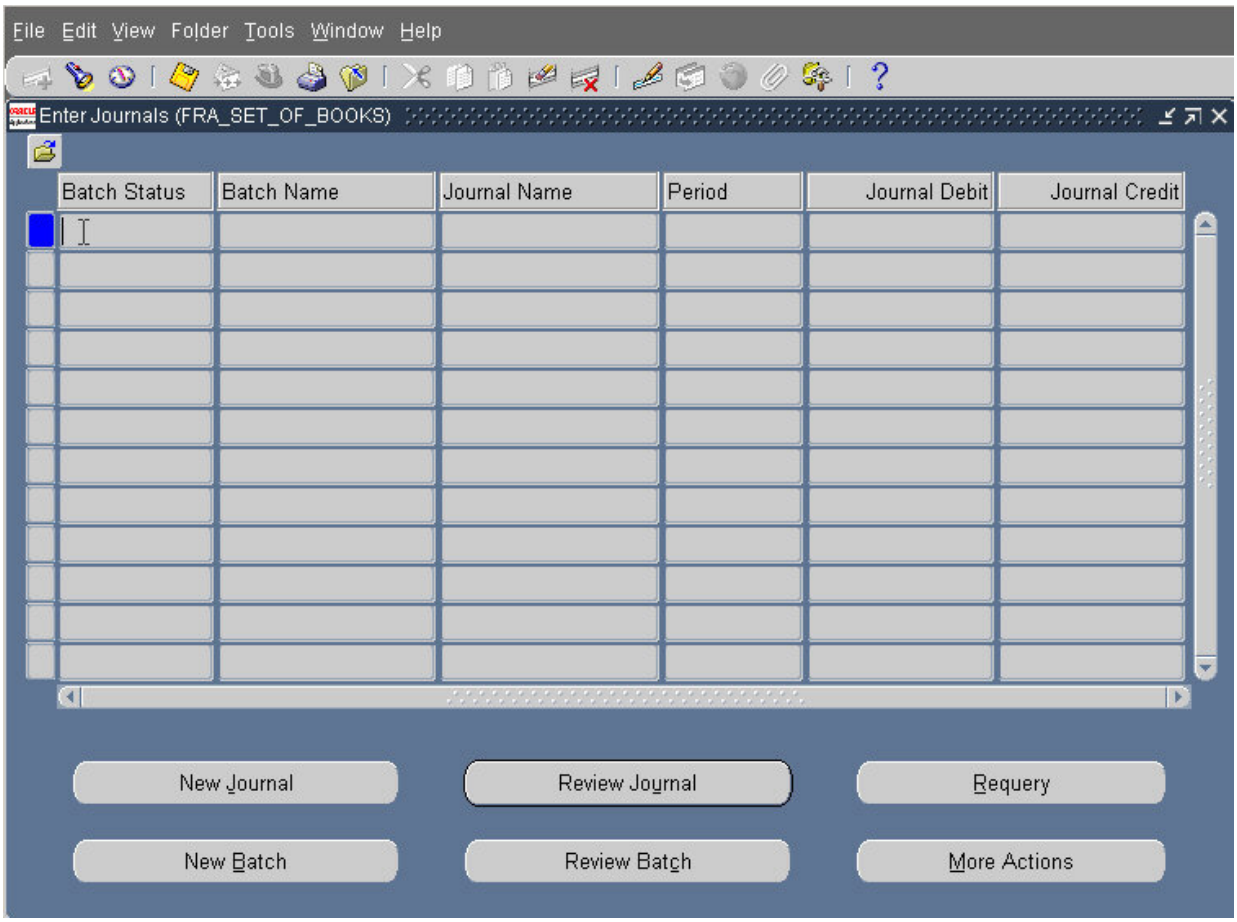
Return to the Navigator window to navigate back to the Customer Summary window and view it using your newly created folder definition.

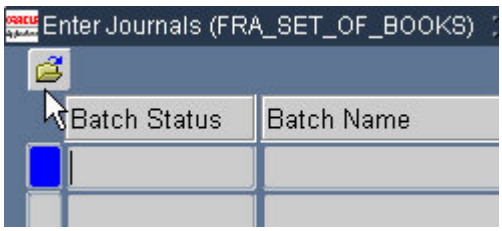
N → Journals → Enter

Close the Find Journals window.

Place your cursor in the first column and first row to enable Folders options.



Select the (I) Folder in the left top corner of the Enter Journal window.



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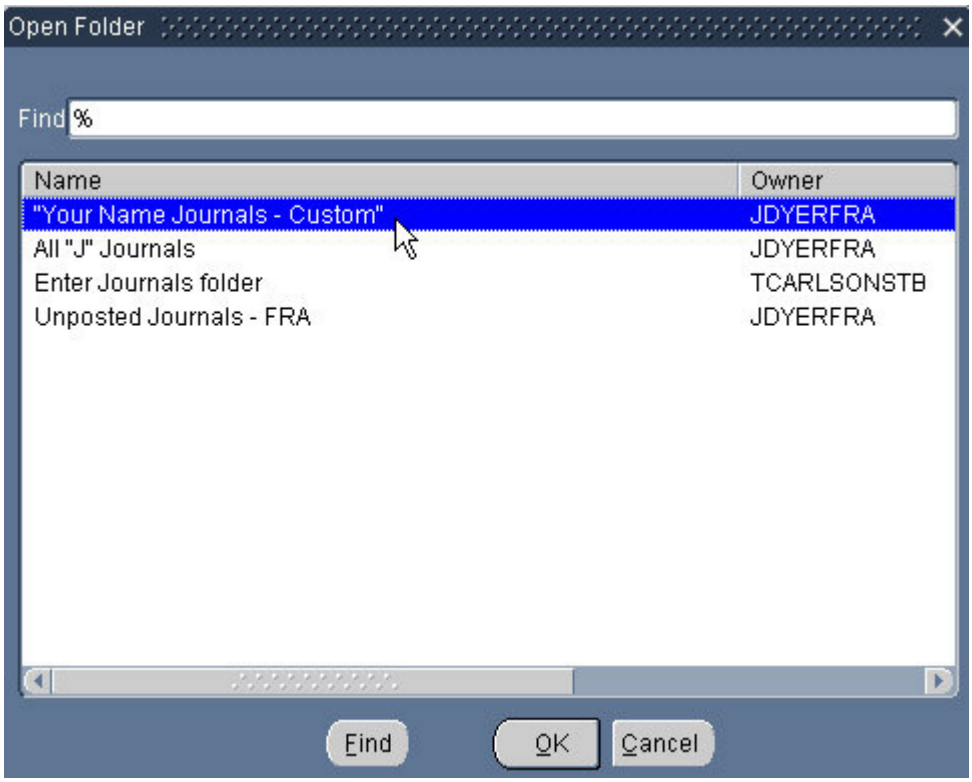
Highlight your folder definition.



Select (B) OK.

The Decision Box window will appear. Select (B) Yes.

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Verify that your window looks similar to the one displayed below.

Close the Enter Journals window and return to the Navigator when you are finished viewing your custom folder.

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